CardVisor® ID Scanner

Software User Manual

Age Verification Application

TOKENWORKS™

About This Document

This document describes how to install the PC software that transfers data between the ID scanner and a PC and/or use the VIP/Banned list (CardVisor III & IV customers) . *The ID Scanners come preloaded with the CardVisor software and therefore it is NOT necessary to install PC software to operate the ID Scanners, unless it has been accidentally erased.* PC Software must be installed to download the transactions

- The Orange Palm CD installs the Palm Desktop software on a PC which is used to transfer data to the ID Scanner
- The White CardVisor CD contains user documentation and utilities used to create the VIP/Banned lists. See the VIP/Banned section (Cardvisor III & IV customers) for install directions.

This document should be used in conjunction with the Handspring Visor user manual (on the Orange Palm CD or available on-line at Palm.com) and the IDVisor Hardware User Manual.

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www.IDVisor.com or www.CardVisor.com (Product Web site)
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Downloading Data from the ID Scanner to a PC

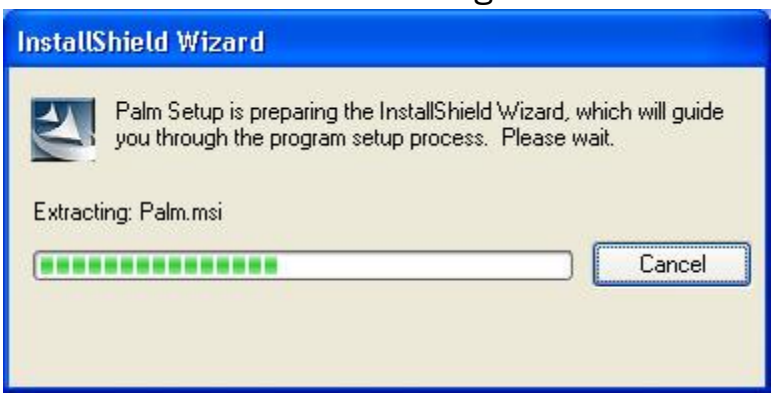
Installing Palm Desktop PC Software

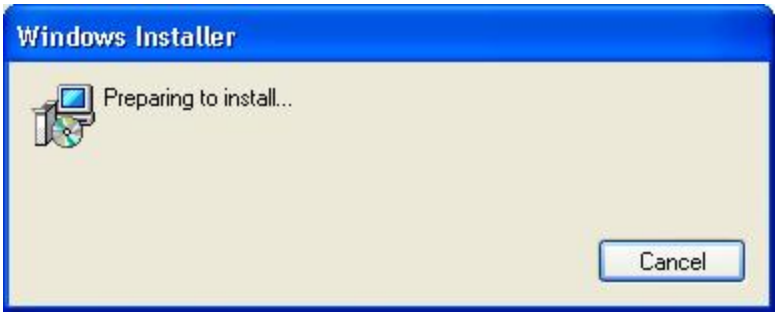
The Palm Desktop Application is on the Orange Palm CD and is used to transfer data between the PC and the Handspring Visor handheld computer. The Palm Desktop application has the same applications found on the handheld device. The MemoPad application is where the swipe transaction data is store. Also installed with the Palm Desktop is a programmed called the Hotsync Manager whose icon looks like this and will appear in the system task tray located in the bottom right corner of the PC screen when running. It must be running (i.e. displayed in the system tray) to perform a Hotsync.

Insert the Orange Palm CD into the CD drive of the computer
It should auto launch the following installation screen:

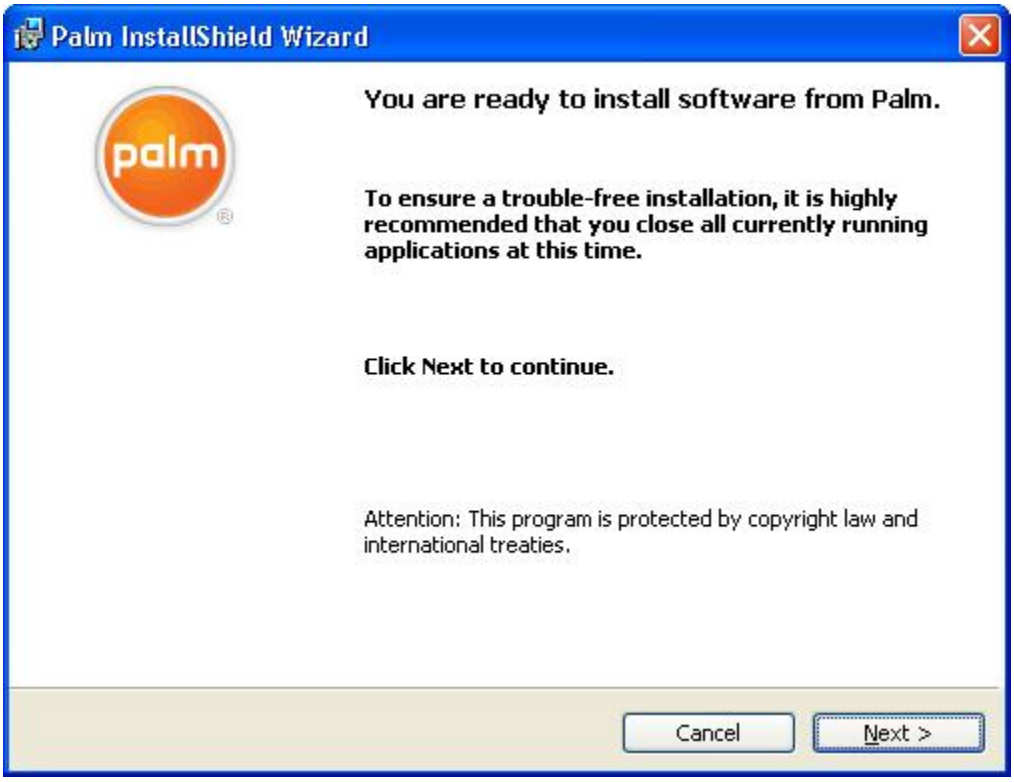
Note: If you have installed the Palm Desktop version 4.01 for the Handspring Visor (Green CD), please read this. The Orange CD (Palm® Desktop 4.1.4 software) supports the following devices: Palm Z22, Palm TX, Treo 600, Treo 650, LifeDrive, Tungsten series, Zire series, Palm i700 series, Palm m500 series, Palm m100 series, Palm VII series, Palm V series, Palm III series and PalmPilot devices. The IDVisor® IDScanner uses the Palm Z22 and CardVisor® ID Scanners use the Handspring. The newest version of the Palm Desktop software (version 4.1.4) will overwrite older versions on the same computer, even if you create a second administrative account. It does NOT support the Handspring Visors. You cannot install both versions on the same machine.

Insert the Palm Z22 CD - Orange

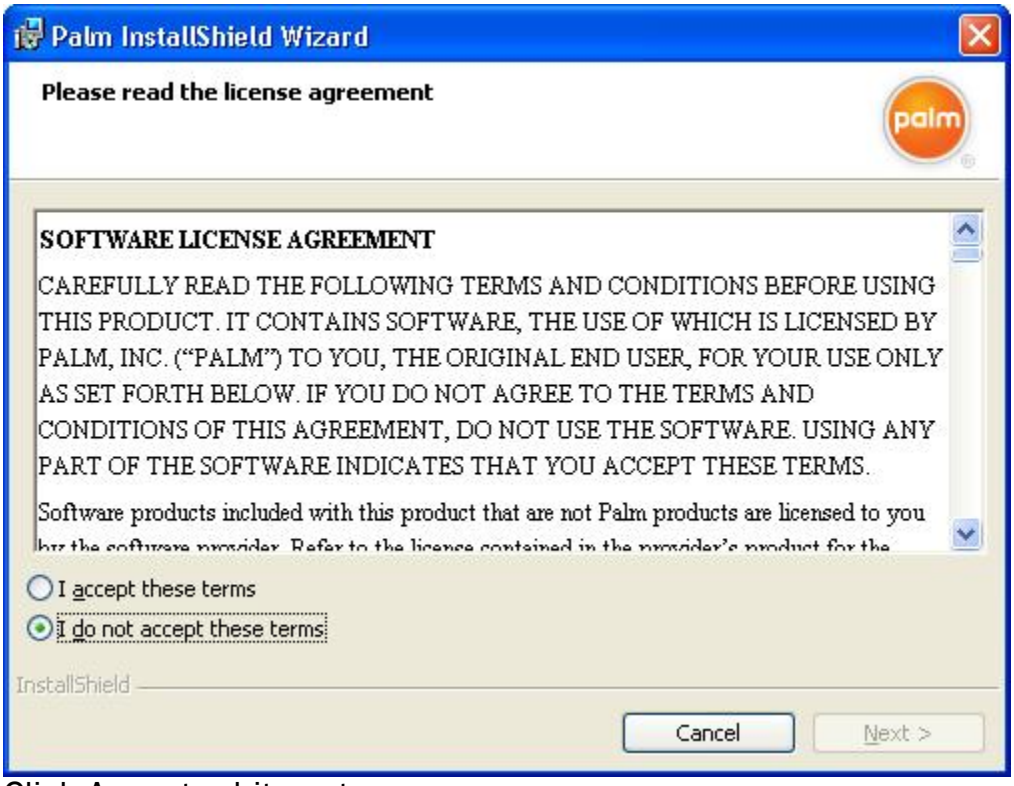

InstallShield Wizard
Palm Setup is preparing the InstallShield Wizard, which will guide you through the program setup process. Please wait.
Extracting: Palm.msi
Cancel



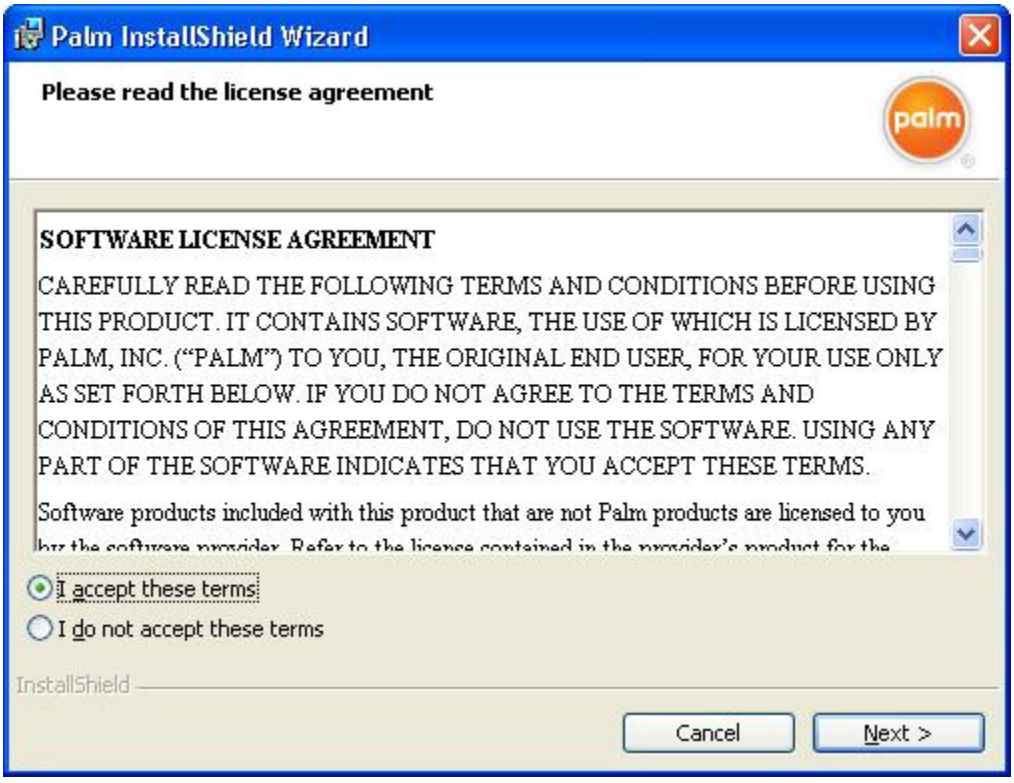
Palm InstallShield Wizard
Welcome to the InstallShield Wizard for Palm
Palm Setup is preparing the InstallShield Wizard which will guide you through the program setup process. Please wait.
Cancel
Next >

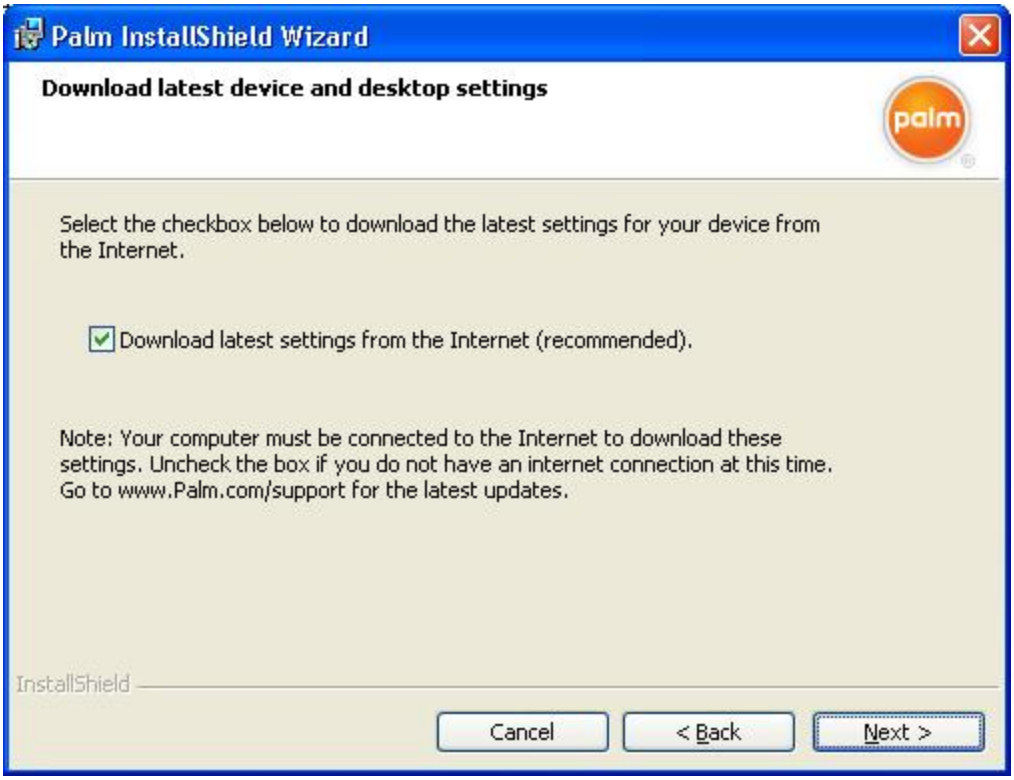

Palm InstallShield Wizard
You are ready to install software from Palm.
To ensure a trouble-free installation, it is highly recommended that you close all currently running applications at this time.
Click Next to continue.
Attention: This program is protected by copyright law and international treaties.
Cancel
Next >

Read the installation screens and Click Next.


Palm InstallShield Wizard
Please read the license agreement
palm
SOFTWARE LICENSE AGREEMENT
CAREFULLY READ THE FOLLOWING TERMS AND CONDITIONS BEFORE USING THIS PRODUCT. IT CONTAINS SOFTWARE, THE USE OF WHICH IS LICENSED BY PALM, INC. ("PALM") TO YOU, THE ORIGINAL END USER, FOR YOUR USE ONLY AS SET FORTH BELOW. IF YOU DO NOT AGREE TO THE TERMS AND CONDITIONS OF THIS AGREEMENT, DO NOT USE THE SOFTWARE. USING ANY PART OF THE SOFTWARE INDICATES THAT YOU ACCEPT THESE TERMS.
Software products included with this product that are not Palm products are licensed to you
I accept these terms
I do not accept these terms
InstallShield
Cancel
Next >

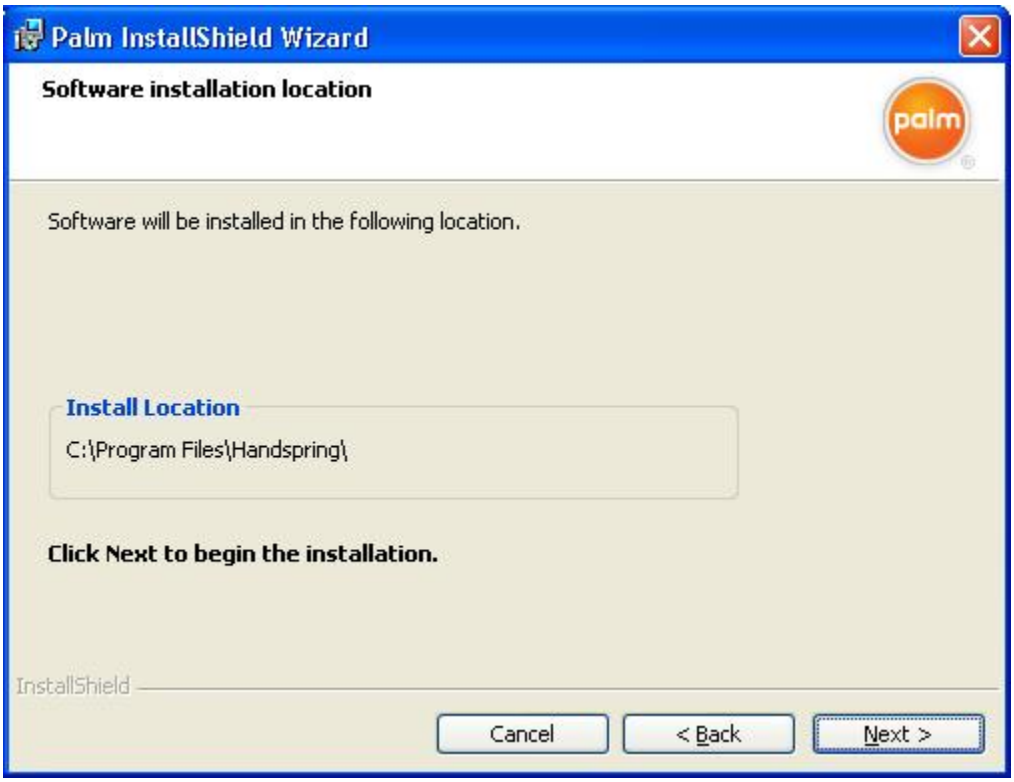
Click Accept – hit next


Palm InstallShield Wizard
Please read the license agreement
palm
SOFTWARE LICENSE AGREEMENT
CAREFULLY READ THE FOLLOWING TERMS AND CONDITIONS BEFORE USING THIS PRODUCT. IT CONTAINS SOFTWARE, THE USE OF WHICH IS LICENSED BY PALM, INC. ("PALM") TO YOU, THE ORIGINAL END USER, FOR YOUR USE ONLY AS SET FORTH BELOW. IF YOU DO NOT AGREE TO THE TERMS AND CONDITIONS OF THIS AGREEMENT, DO NOT USE THE SOFTWARE. USING ANY PART OF THE SOFTWARE INDICATES THAT YOU ACCEPT THESE TERMS.
Software products included with this product that are not Palm products are licensed to you
I accept these terms
I do not accept these terms
InstallShield
Cancel
Next >

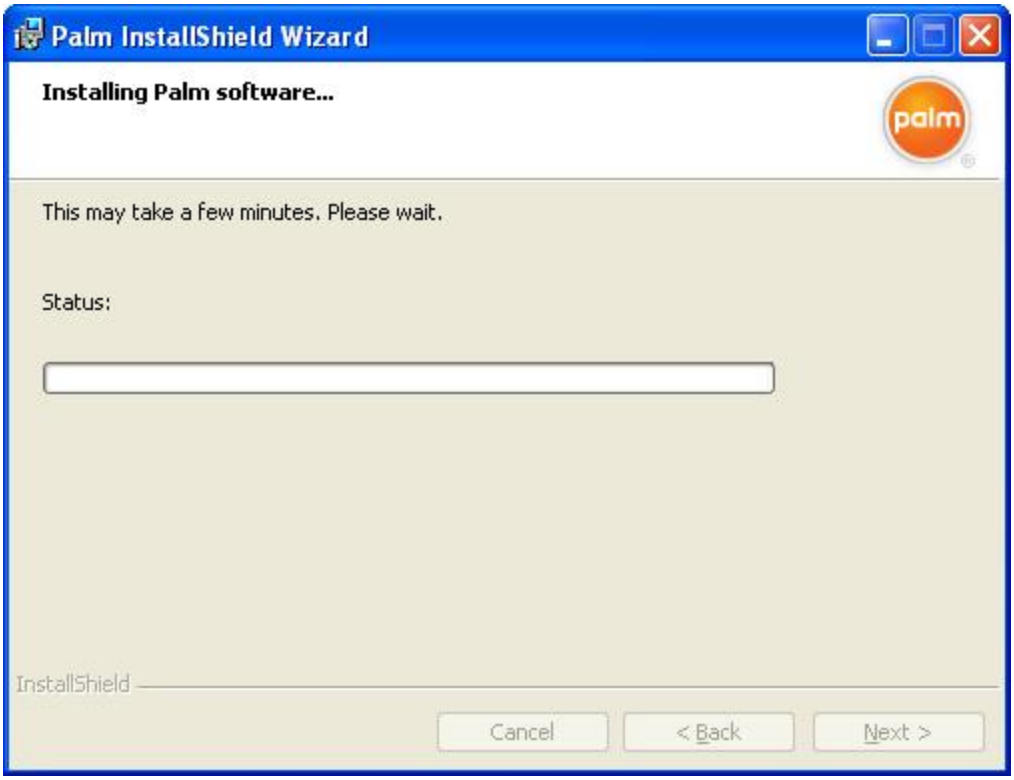

Palm InstallShield Wizard
Download latest device and desktop settings
palm
Select the checkbox below to download the latest settings for your device from the Internet.
Download latest settings from the Internet (recommended).
Note: Your computer must be connected to the Internet to download these settings. Uncheck the box if you do not have an internet connection at this time. Go to www.Palm.com/support for the latest updates.
InstallShield
Cancel
< Back
Next >

Leave check box checked – hit next

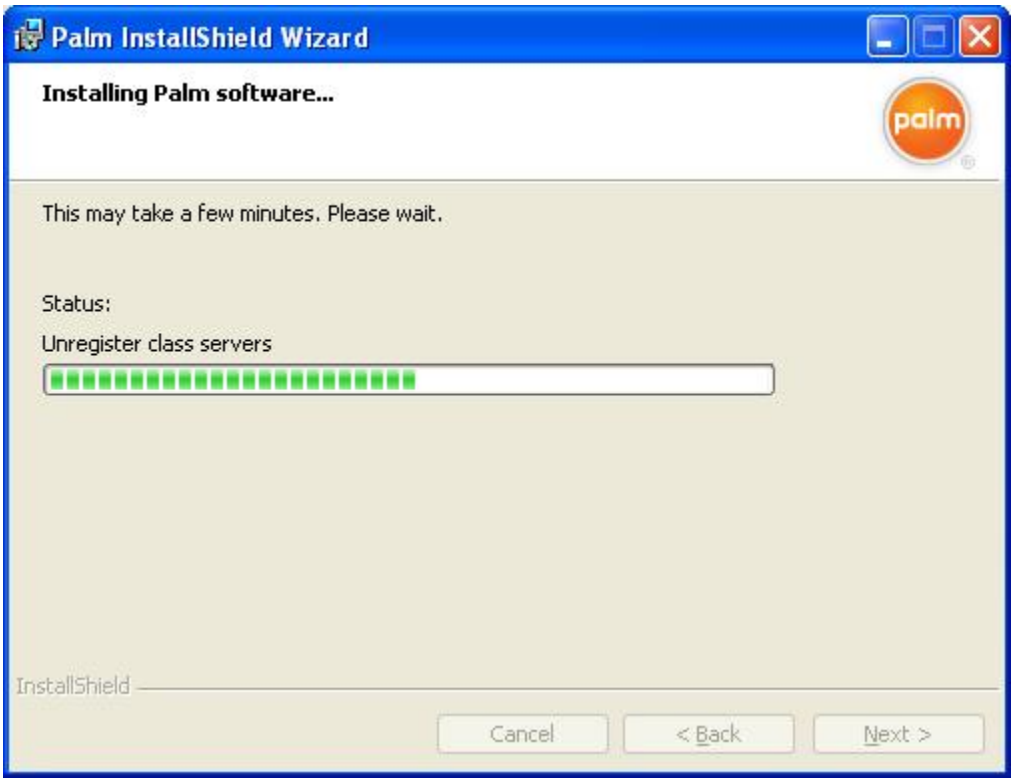
Note: if the install location is C:\Program Files\Handspring as shown below, then a previous version of the Palm Desktop was installed on this PC. This installation software will OVER-WRITE the previous version. Do NOT hit next if you want to continue to synchronize Handspring Visor PDAs on this machine, otherwise accept default destination folder and hit Next.

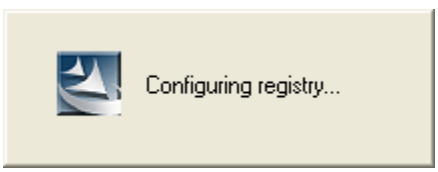


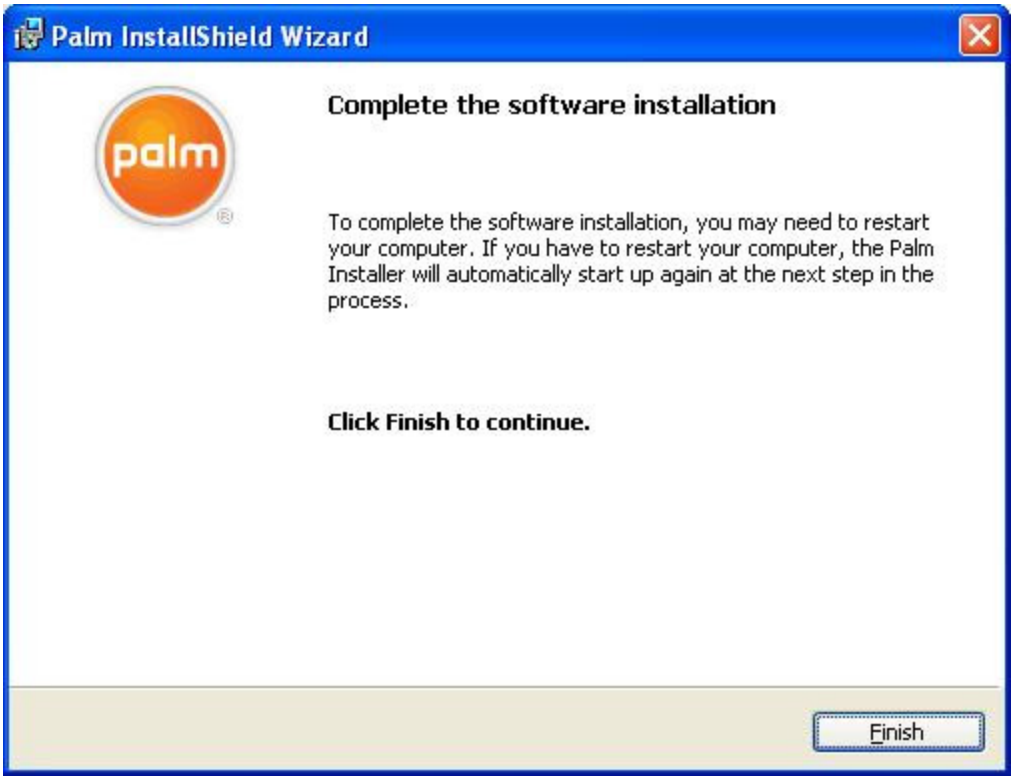
Click Next to continue – Note: New installs with default to \Palm directory.



Installation Screen shot



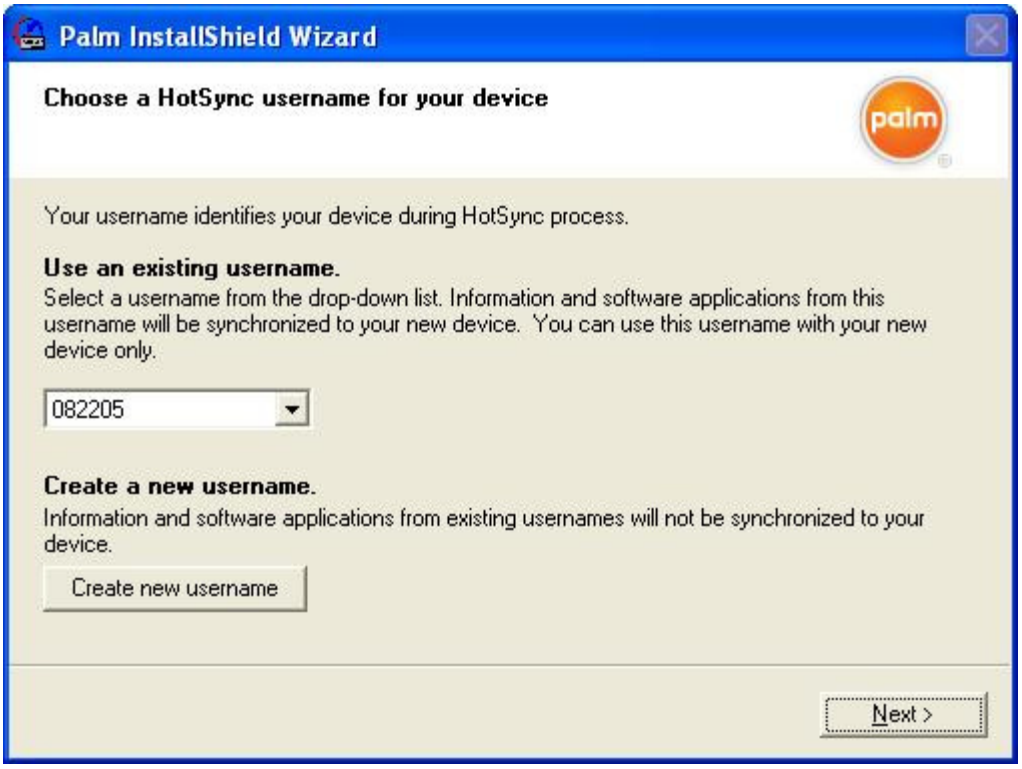



Palm InstallShield Wizard
Complete the software installation
To complete the software installation, you may need to restart your computer. If you have to restart your computer, the Palm Installer will automatically start up again at the next step in the process.
Click Finish to continue.
Finish

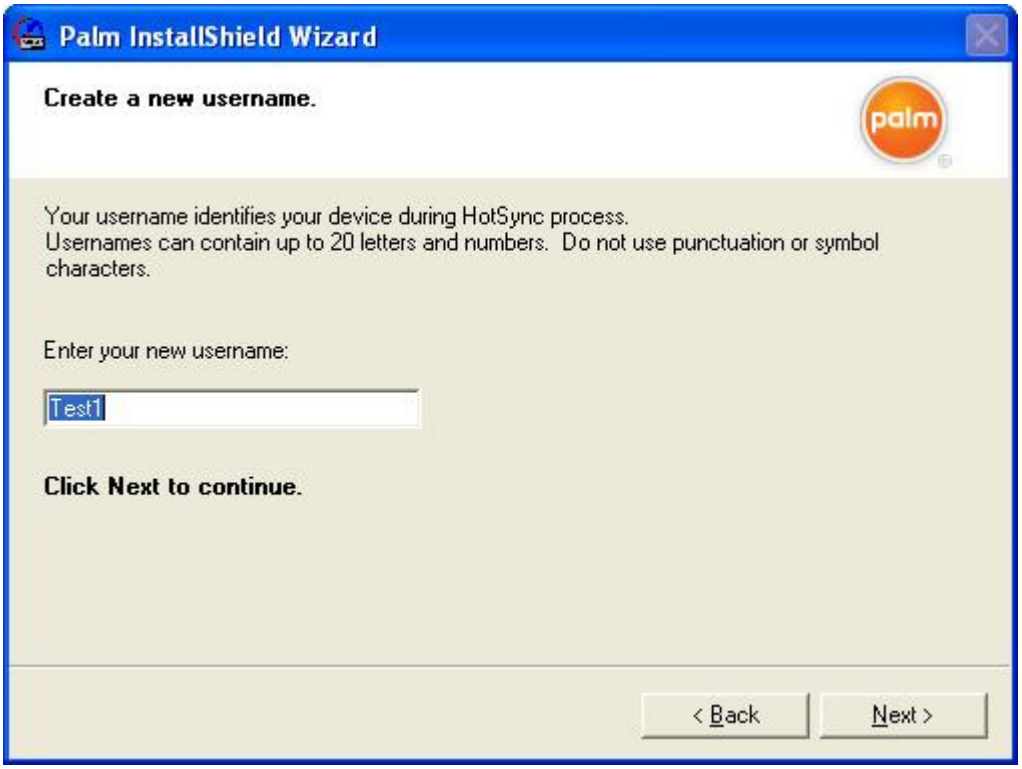
Click Finish

Palm InstallShield Wizard
Congratulations!
Your software was installed successfully.
1. Install desktop software from Palm.
2. Synchronize your device and computer.
The HotSync process synchronizes information between your device and computer.
3. Register your device.
4. Install additional software.
Click Next to go to step 2.
Next >

Click Next


Palm InstallShield Wizard
Choose a HotSync username for your device
palm
Your username identifies your device during HotSync process.
Use an existing username.
Select a username from the drop-down list. Information and software applications from this username will be synchronized to your new device. You can use this username with your new device only.
082205
Create a new username.
Information and software applications from existing usernames will not be synchronized to your device.
Create new username
Next >

Click create new user name. We suggest using a YYMMDD format and if applicable append a single character when multiple devices present at one location. . Note: The IDVisor® ID scanner will probably have a Hotsync name of IDVisor2, IDVisor3 or IDVisor4 depending on which version of CardVisor software is installed.


Palm InstallShield Wizard
Create a new username.
palm
Your username identifies your device during HotSync process.
Usernames can contain up to 20 letters and numbers. Do not use punctuation or symbol characters.
Enter your new username:
Test1
Click Next to continue.
< Back
Next >

Enter user or Hotsync name and click Next.

If Microsoft Outlook is installed on the PC, the following dialog box will be display. It is vital that Outlook is NOT selected at this point. Select Palm Desktop software and hit Next.

Palm InstallShield Wizard
Choose your software preference for HotSync process
palm
There are two ways to synchronize your calendar, contacts, notes and tasks
Synchronize your device with Palm Desktop software.
Synchronize your device with both Microsoft Outlook and Palm Desktop.
With either option, Palm Desktop will continue to manage your other device information (photos, videos, etc.)
< Back
Next >

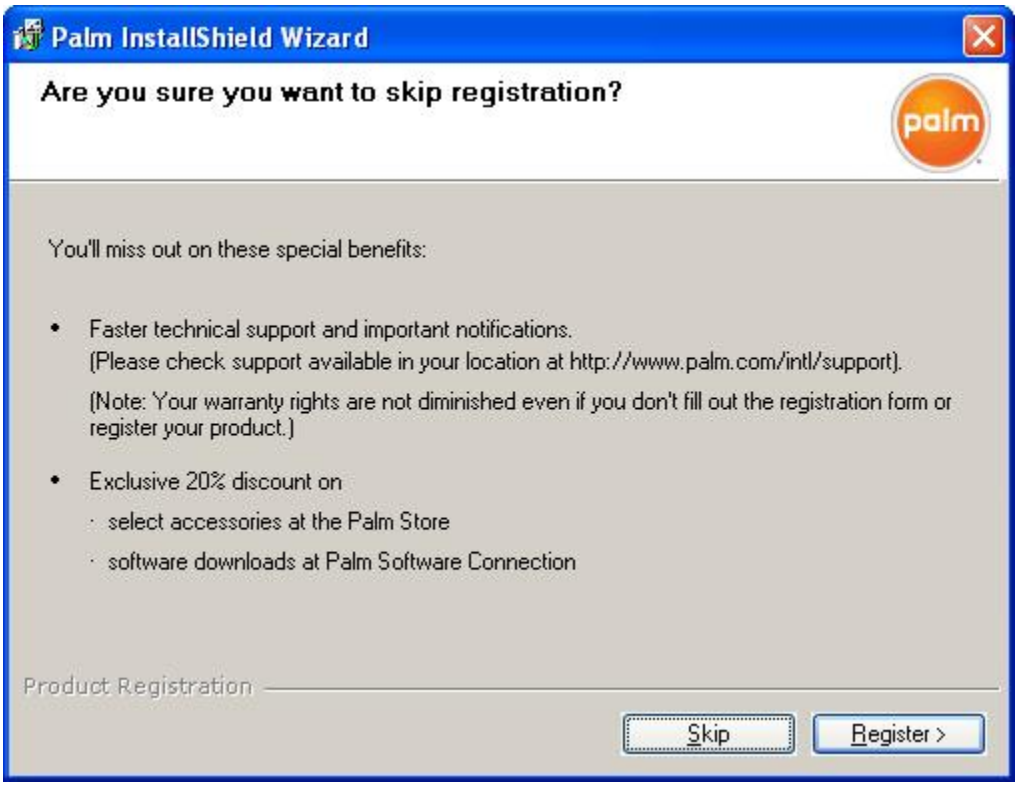
Again, it is vital that Outlook is NOT selected at this point. Select Synchronize your device with Palm Desktop software, then hit next. Note: If Outlook is selected, swipe data will be stored in Outlook where it is not easy to export to Excel. If this occurs, see below for details on changing back to Palm Desktop.

Palm InstallShield Wizard
Synchronize your device and computer
palm
Before you begin, make sure you have:
• Fully charged your device
• Turned on your device, calibrated the screen and set the time
• Connected the USB cable to both your device and your PC
Tap the HotSync icon on the device to begin
Skip

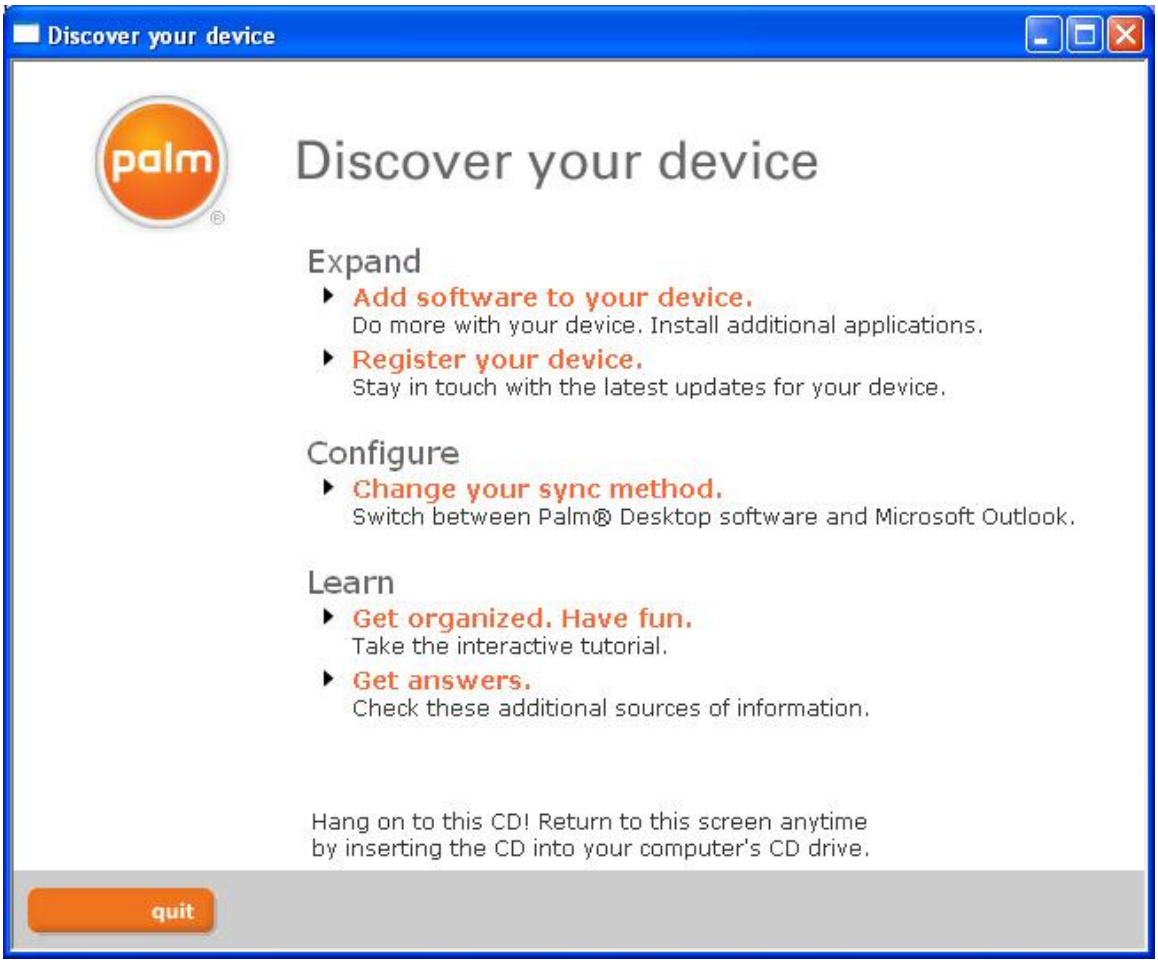
At this point, make sure you see the HotSync Icon in the bottom right corner of the PC screen (red/blue circular icon). Make sure the Hotsync Cable is connected to the PC and the IDVisor USB port. DISCONNECT THE WALL CHARGER WHEN HOTSYNCING. Then Press the HotSync Button as shown above.

Register with Palm is optional.

Palm InstallShield Wizard
Register your device
palm
The benefits you get when you register your device:
• Faster technical support and important notifications.
(Please check support available in your location at http://www.palm.com/intl/support).
(Note: Your warranty rights are not diminished even if you don't fill out the registration form or register your product.)
• Exclusive 20% discount on
· select accessories at the Palm Store
· software downloads at Palm Software Connection
Click Next to continue.
Product Registration
Skip
Next >


Palm InstallShield Wizard
Are you sure you want to skip registration?
palm
You'll miss out on these special benefits:
• Faster technical support and important notifications.
(Please check support available in your location at http://www.palm.com/intl/support).
(Note: Your warranty rights are not diminished even if you don't fill out the registration form or register your product.)
• Exclusive 20% discount on
· select accessories at the Palm Store
· software downloads at Palm Software Connection
Product Registration
Skip
Register >

Palm InstallShield Wizard
You have skipped registration.
palm
You can register your device at another time.
1. Install Palm software.
2. Synchronize your device and computer.
3. Register your device.
4. Install additional software.
Install software to extend the features and functionality of your Palm device.
Click Next to go to step 4.
Product Registration
Skip
Next >


Discover your device
palm
Discover your device
Expand
Add software to your device.
Do more with your device. Install additional applications.
Register your device.
Stay in touch with the latest updates for your device.
Configure
Change your sync method.
Switch between Palm® Desktop software and Microsoft Outlook.
Learn
Get organized. Have fun.
Take the interactive tutorial.
Get answers.
Check these additional sources of information.
Hang on to this CD! Return to this screen anytime
by inserting the CD into your computer's CD drive.
quit

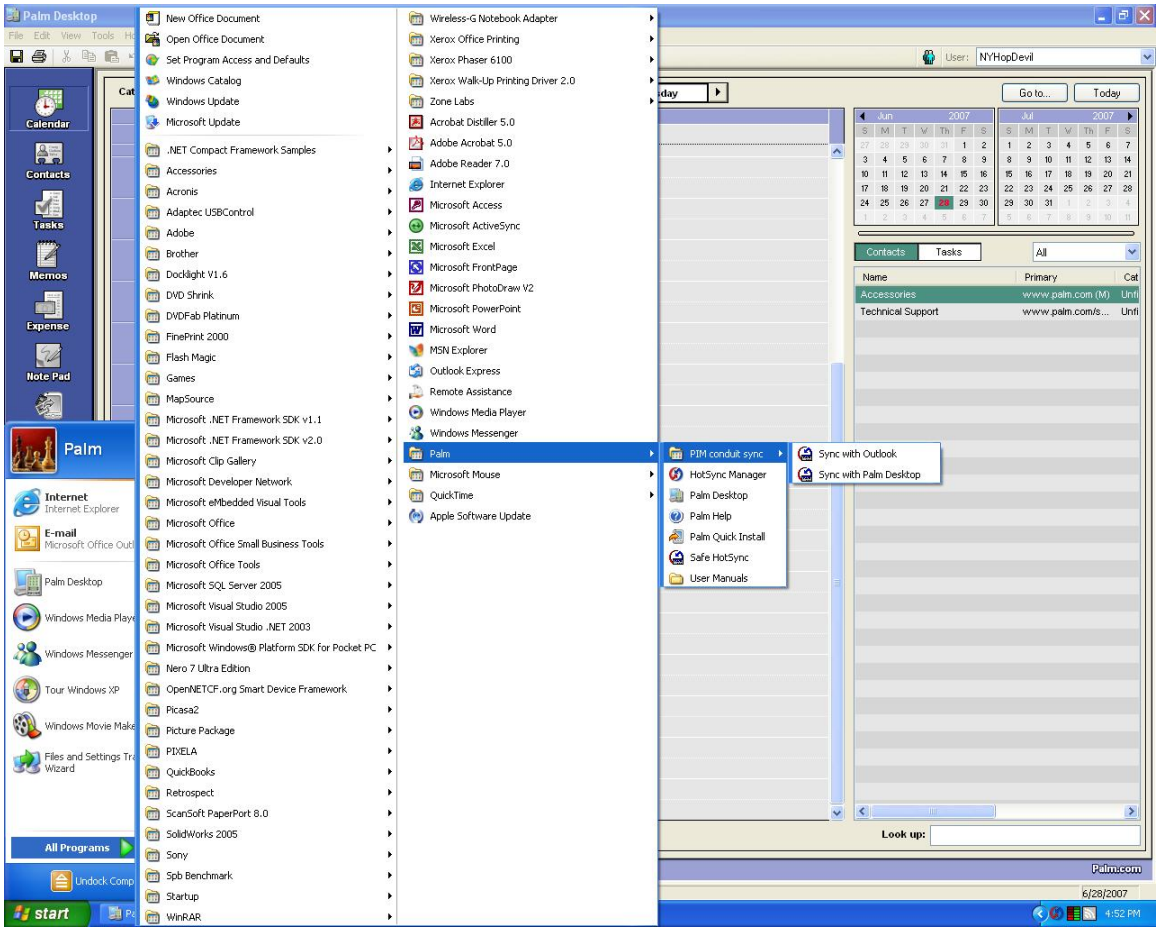
First HotSync Operation

Assuming the Palm Desktop software has been installed and that the HotSync manager is running (look for Hotsync icon in system tray located in bottom right of the screen), it is time to perform the first HotSync which will 'synchronize' the data between the handheld and the Palm Desktop. Place the handheld in the HotSync cradle or connect it to the PC with a HotSync cable and follow the directions on the next page. If the HotSync window does not open on the Desktop computer: perform each of these steps in order. After each step, try to synchronize. If the HotSync operation succeeds, the problem is resolved and don't try the next step.

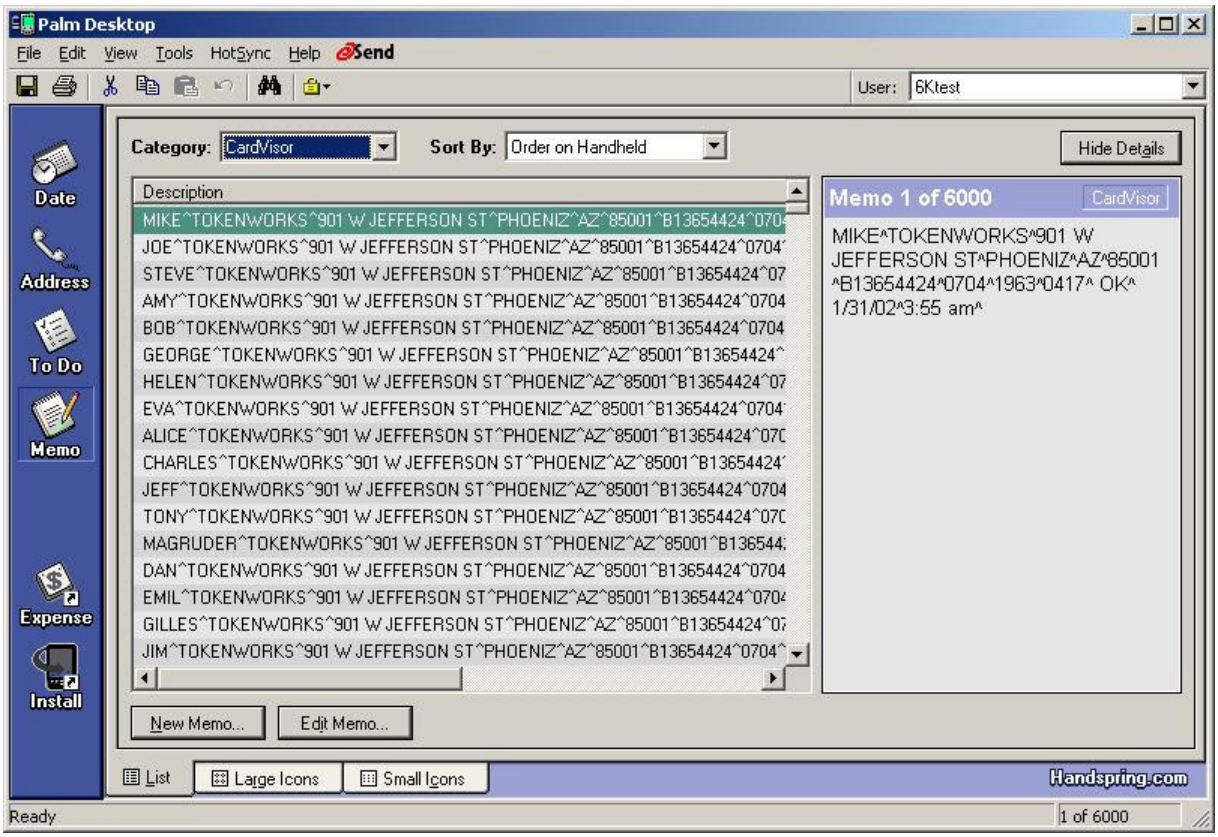
1. Is the Wall Charger Connected to IDVisor™ Z22? Remove the Wall Charger from the IDVisor™ Z22 while Hotsyncing, remove&reinsert USB cable. The Wall Charger must be removed when connecting with a PC.
2. Is HotSync Manager on? Before you can synchronize, this software needs to be running. Turn it on if necessary by going to the Handspring folder and double clicking on it.
3. Perform a soft reset on the Handheld: This is a great trick for solving a number of problems. See the hardware reference guide for details.
4. Disconnect your device from the HotSync cable or cradle, and connect it again. Don't press the HotSync button until the device is fully connected.
5. Failure to communicate: Make sure that your desktop computer and handheld device are communicating properly.
6. Alarms pending? If any Calendar, To Do, SMS, MMS, voicemail, email or other alarms are awaiting a response from you, tap on "OK."
7. HotSync configuration: Make sure you have the right cradle/cable, and your HotSync software is correctly configured.

Once Hotsync is complete, launch the Palm Desktop application, set the User name to the one just created (see user name pull down menu in top right corner) and click on the MemoPad icon on the left menu bar. Shown below is what the Main screen of the Palm Desktop with the Memo Pad active should look like. Check that the number of Memos matches the number of Memos in the Handheld. On the left, the Memo is highlighted and on the right are its contents.

Troubleshooting tip -> If there are no Memos and the HotSync operation worked, ensure that Outlook is not the default program for syncing data. Press the Start button ->All Programs->Palm->PIM Conduit sync and select the 'Sync with Palm Desktop' (see screen shot below) Then perform another Hotsync and the data should appear in the Memos section.



Select ‘Sync with Palm Desktop’



Main Screen of the Palm Desk Top showing the Memo Pad

Exporting from Palm Desktop & Importing to Microsoft Excel

There are two methods to moving the license data from the Palm Desktop to Microsoft Excel. The original method involves exporting the data from the Palm Desktop to a file and then opening the file using the import wizard of Microsoft Excel. In Mid 2007, MemoPad2CSV software was introduced. The MemoPad2CSV software automates the process a bit and most users will find it easier than the original method detailed below.

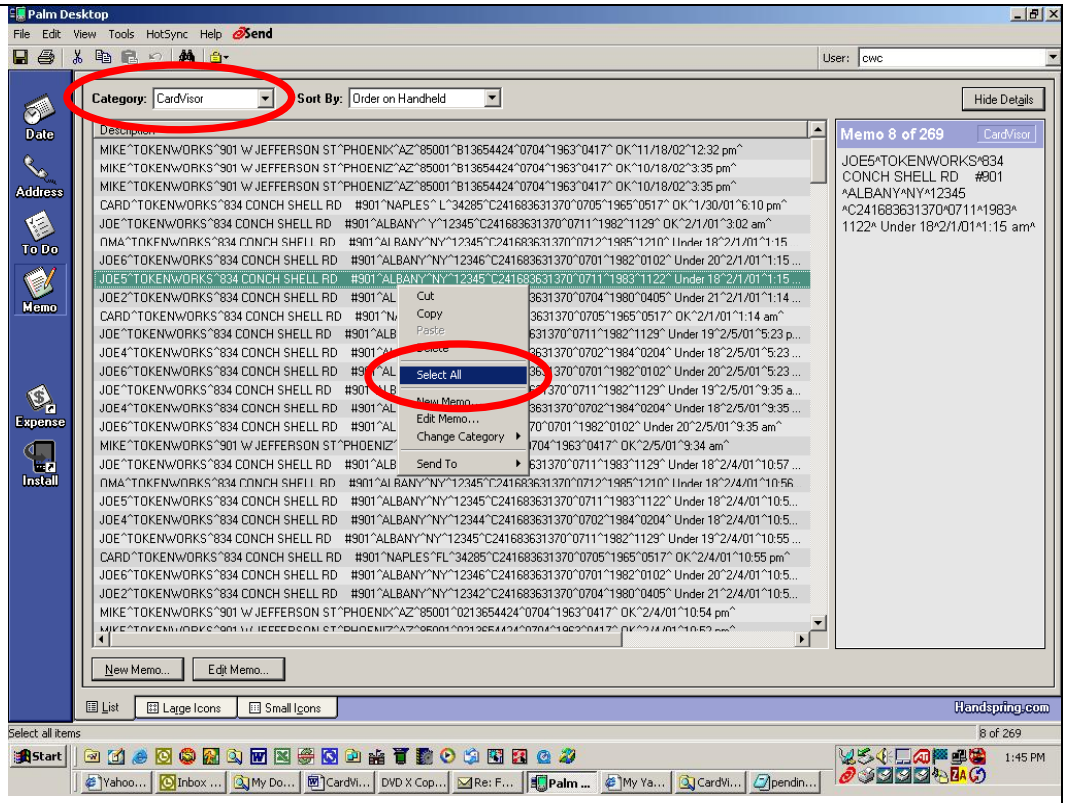
Exporting data from the Palm Desktop – Using MemoPad2CSV

See the Installation and Use document located in the MemoPad2CSV directory on CardVisor Software CD.

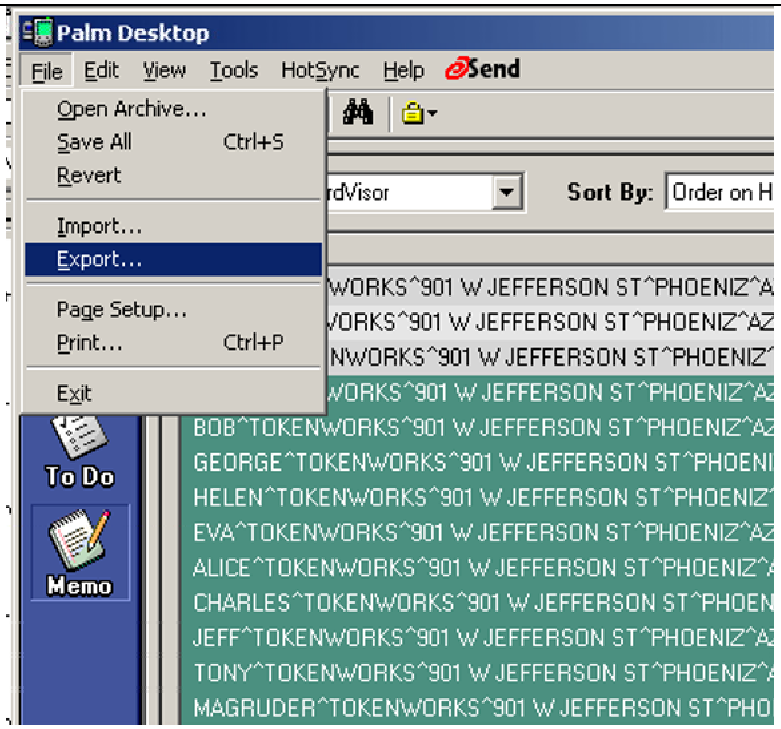
Exporting data from the Palm Desktop – The Original Method

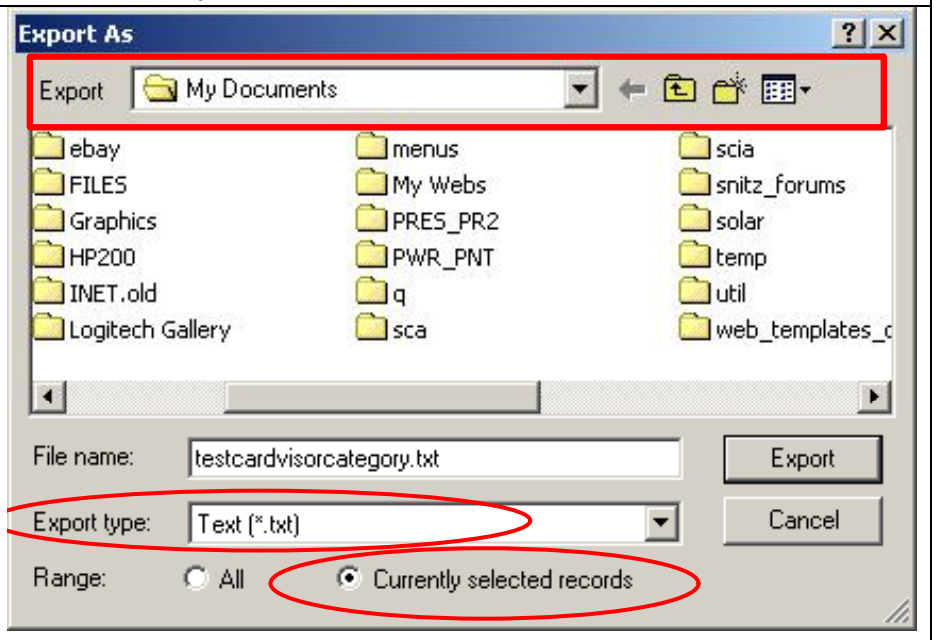
The Palm Desktop application allows all or selected Memos to be exported in several common formats including comma delimited, tab delimited format, and text. This document will use text since CardVisor puts field delimiters in the data (^ character) which the import wizard of Excel and Access can recognize. To start the process, first select the memos, which are to be exported. It is possible to export all or just a subset of the memos to be exported by highlighting the desired memos. Follow the directions below to export just the Memos which are categorized with the "CardVisor" Category.

1.) Set the Category to "CardVisor" - See Category box circled in RED on right.



2.) Place the mouse cursor in the middle of the 'Description' window and right click. This will open a small menu, select the

	‘Select All’ menu item. See RED circled on right.
Then, from the main File menu, select the Export option. Palm Desktop –> File -> Export This will launch the Export As window that determines the file name, format and storage location.	

Export As Window	
First select the file folder in the Export Window where the file should be saved. Use the Pull Down arrow to change directories. Then Set the Export type as Text (*.txt) as the file Export type Then set the Range for 'Currently selected records'	 Finally, enter a file name that contains the date(s) of the license captures. This will help identify the file later Click on the Export button.

Important: Make sure the file extension is " .txt" and not " .csv" since files with the "csv" file extension will not cause the Excel import wizard to launch. If accidentally used, the *csv* file extension can be rename to *txt* by the file manager and no harm will be done.

After hitting the Export button, the program will ask which field of the Memo Pad should be exported. There are three fields in the Memo Pad application; Memo, Private and Category. The Memo field contains the track data, the private field indicates whether the Palm OS should treat the record as private, and the last field is the category. For this example, only the track data will be exported so just check the Memo items.

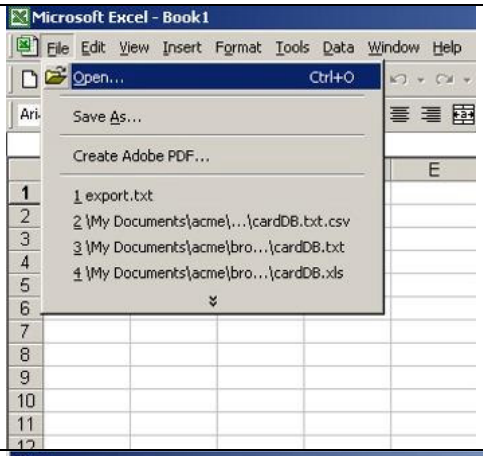
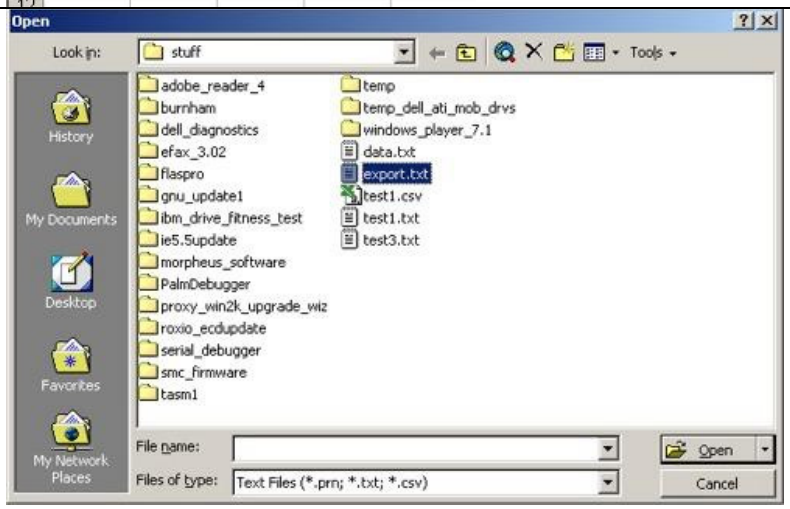
Specify only the Memo Pad field for Export

1.) Check the Memo item
2.) Uncheck the Private and Category items
3.) Hit the OK button

After this window closes, the data will be exported and saved to the export file. The Export complete message box should be displayed.

Importing MemoPad Data to Microsoft Excel – The Original Method

The data exported from the Palm Desktop (see above) uses the carat character (^) to delimit each field. Many 3rd party marketing firms prefer to receive contact data in Excel spreadsheet format. Also to create mailing labels using the provided mailing label application note (see White CardVisor CD), it is necessary to import the data to Microsoft Excel. For this example, Excel will be used because the mailing label application notes are based on it. However, the import wizards for both Excel and Access are very similar.

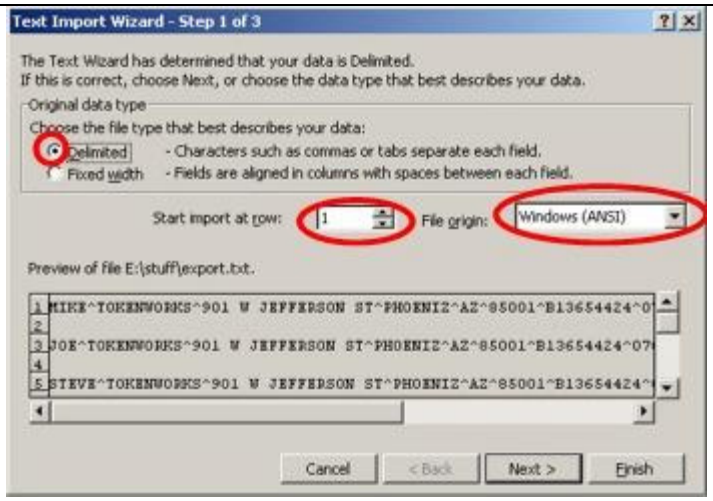
Click on the File -> Open menu item. This will launch the Open Dialog box shown below.	
Select the directory which contains the exported memoPad data. Change the file type to Text Files (*.prn, *.txt, *cvs) Select the correct file (e.g. export.txt) or type the correct file name into the file name text box. Hit the open button.	

After pushing the Open button the Excel import wizard will launch. This Wizard determines how the data in the file will be interpreted when imported in the Excel spreadsheet.

Select the Delimited radio button

Start import at row 1

File Origin Windows (ANSI)


Text Import Wizard - Step 1 of 3
The Text Wizard has determined that your data is Delimited.
If this is correct, choose Next, or choose the data type that best describes your data.
Original data type
Choose the file type that best describes your data:
Delimited - Characters such as commas or tabs separate each field.
Fixed width - Fields are aligned in columns with spaces between each field.
Start import at row: 1
File origin: Windows (ANSI)
Preview of file E:\stuff\export.txt.
1 MIKE^TOKENWORKS^901 W JEFFERSON ST^PHOENIZ^AZ^85001^B13654424^0
2
3 JOE^TOKENWORKS^901 W JEFFERSON ST^PHOENIZ^AZ^85001^B13654424^07
4
5 STEVE^TOKENWORKS^901 W JEFFERSON ST^PHOENIZ^AZ^85001^B13654424^
Cancel
< Back
Next >
Finish

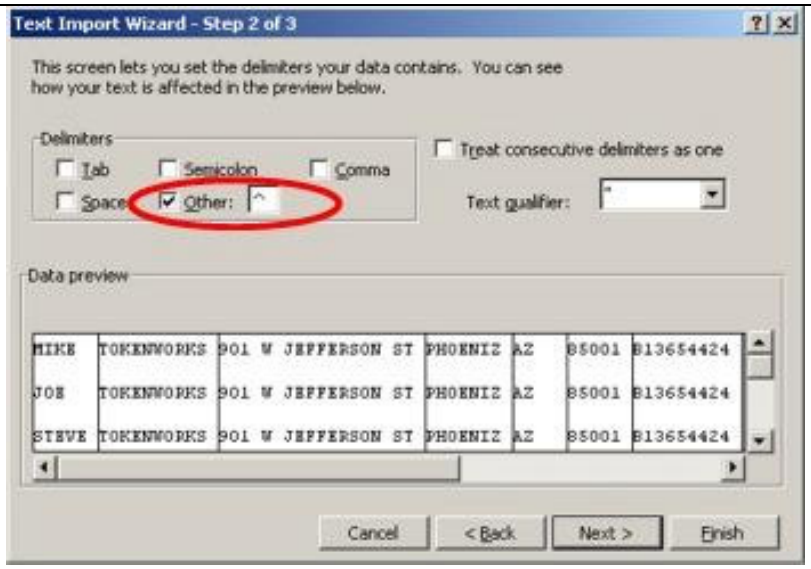
In the second step, the Wizard asks how the fields are to be delimited.

Check the 'Other' delimiter option

Uncheck the tab, space, semicolon, and comma options.

Type the carat character '^' into the 'Other' delimiter text box

Hit the next button

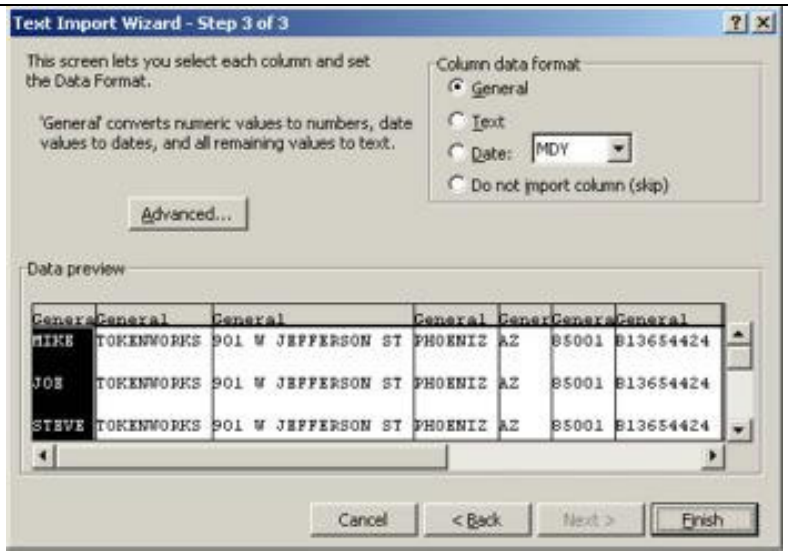

Text Import Wizard - Step 2 of 3
This screen lets you set the delimiters your data contains. You can see how your text is affected in the preview below.
Delimiters
Tab
Semicolon
Comma
Space
Other: ^
Treat consecutive delimiters as one
Text qualifier:
Data preview
MIKE TOKENWORKS 901 W JEFFERSON ST PHOENIZ AZ 85001 B13654424
JOE TOKENWORKS 901 W JEFFERSON ST PHOENIZ AZ 85001 B13654424
STEVE TOKENWORKS 901 W JEFFERSON ST PHOENIZ AZ 85001 B13654424
Cancel
< Back
Next >
Finish

Note: Once you enter the carat character into the text box, the Wizard will put vertical lines in the Data preview window. Make sure the lines are shown in the appropriate locations before proceeding.

The final step in the process is to indicate the format of the data in each column.

Hit the Finish Button

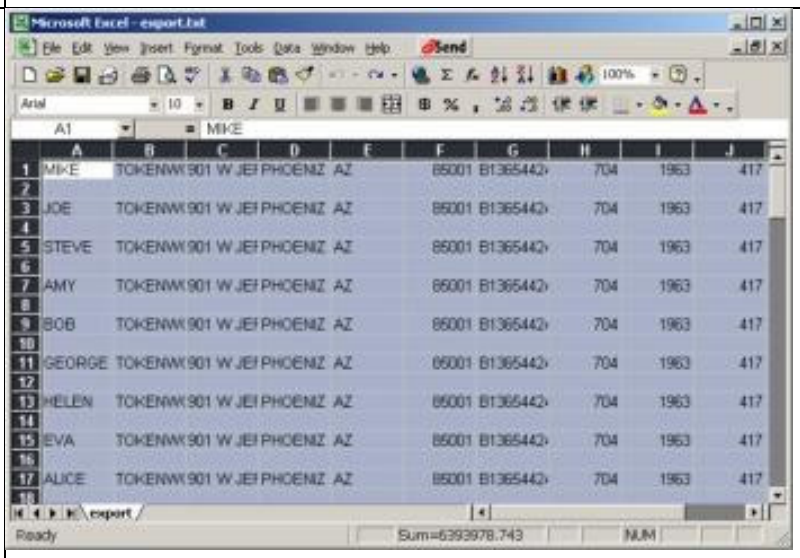
Note: For mailing labels, General is fine on all columns. If certain information should be treated differently, this screen allows it to be formatted appropriately.


Text Import Wizard - Step 3 of 3
This screen lets you select each column and set the Data Format.
'General' converts numeric values to numbers, date values to dates, and all remaining values to text.
Column data format
General
Text
Date: MDY
Do not import column (skip)
Advanced...
Data preview
MIKE TOKENWORKS 901 W JEFFERSON ST PHOENIZ AZ 85001 B13654424
JOE TOKENWORKS 901 W JEFFERSON ST PHOENIZ AZ 85001 B13654424
STEVE TOKENWORKS 901 W JEFFERSON ST PHOENIZ AZ 85001 B13654424
Cancel
< Back
Next >
Finish

After hitting the finish button the data now has been imported into Excel.

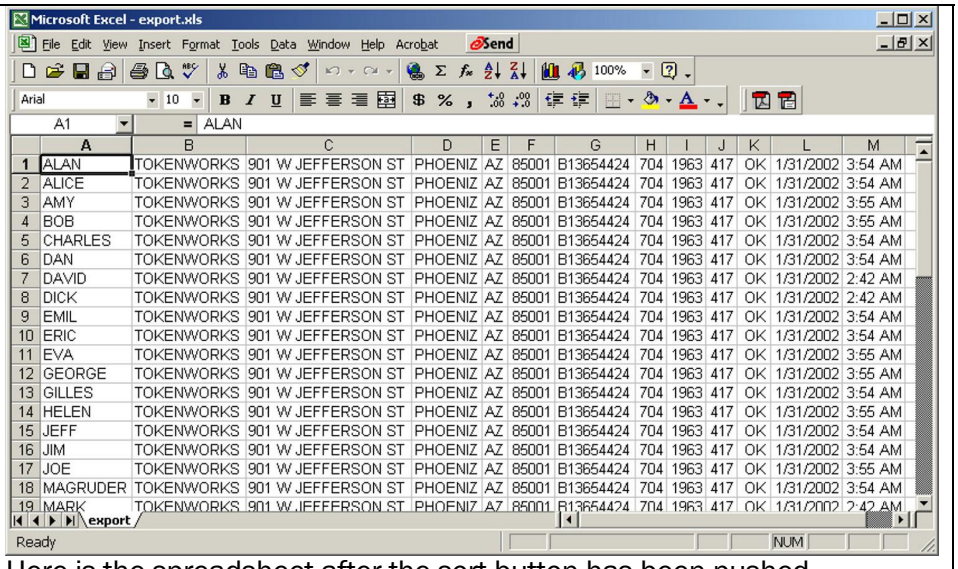
Shown here is what the imported data will look like in Excel.

Note that the first name is in column A, the last name in column B, address in column C. Also note each entry is in its own row and that in this example there are blank rows between each row of license data.

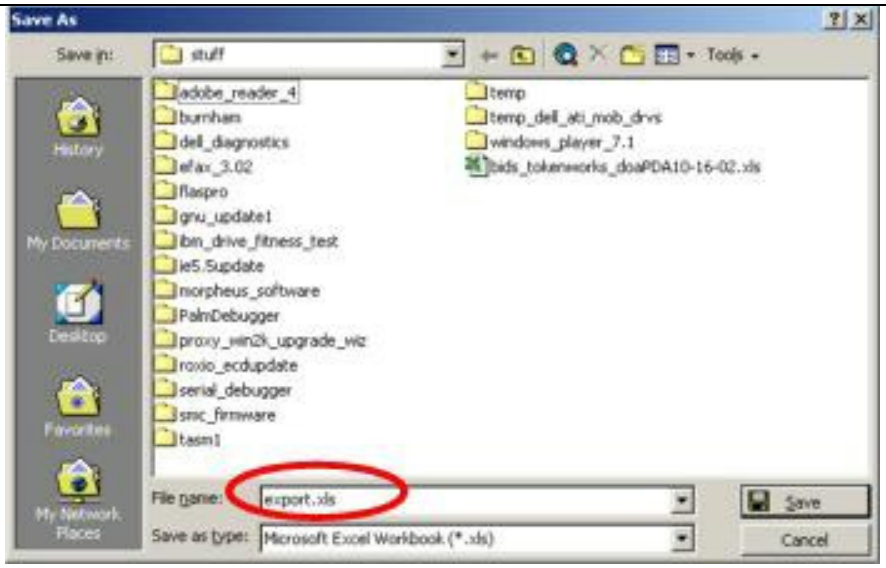


To remove the empty rows in the data, just hit the sort button .

Or select the Data -> Sort menu item to sort the entire spreadsheet.



Here is the spreadsheet after the sort button has been pushed.

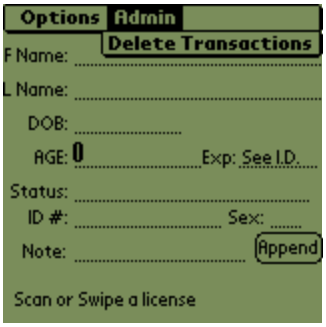
The final step in the process is to save the new Excel spreadsheet. Select the File -> Save As menu item. This will launch the Save As dialog window shown on the right. Enter the desired file name and type. In the example shown, the file type is Microsoft Excel Workbook (*.xls) and name is 'export.xls.'	

Deleting Data from Handheld

Before deleting the data on the handheld, make sure it is completely transferred to the Palm Desktop and exported to a text file as described above. To verify, open the exported file with a text editor such as Notepad (part of Windows) and examine the first and last line in the file to make sure they match the first and last memo in the handheld's MemoPad application. If complete, it is safe to delete the data in the Handheld.

There are two ways to delete the data from the Handheld. One is to delete the data directly on the machine via built in menu and the second is to use the Palm Desktop & Hotsync manager. If the data is not being downloaded to the PC, then its easiest to delete the data directly on the machine.

Deleting Data directly on ID Scanner



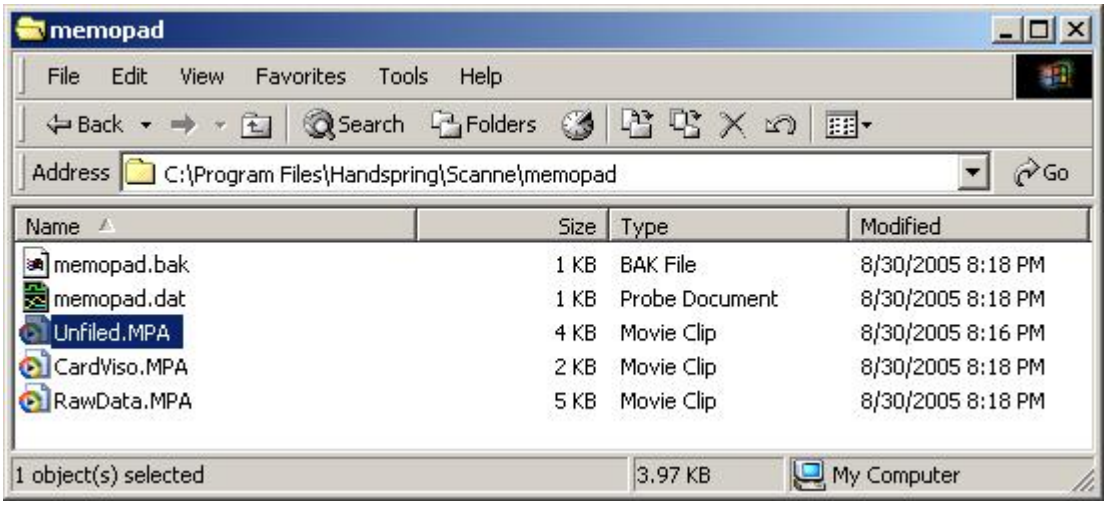
To delete via the handheld just tap on the top left corner of the main CardVisor screen on the word CardVisor and from the menu options select Admin and then delete data. Follow the prompts. If the data has been transferred to the Palm Desktop, remember to also delete them from the Palm desktop or they will reappear during the next Hotsync.

Deleting Data via Palm Desktop & HotSync Manager

Us this approach if you plan to download the data to the Palm Desktop as it will ensure the PC and the ID Scanner transaction logs stay in sync.

1. Open the Palm Desktop Application.
2. Select the Hotsync User name for the PDA you'd like to delete the data from. If you have multiple hotsync names for the same PDA, select the one used during the last Hotsync.
3. Select the MemoPad icon (left side of screen). You should see the Memos appear on the main screen.
4. Go to the Edit Menu item, click on select - > All. This will highlight ALL the Memos. Or you can click on one Memo and which holding down the mouse key, drag down across the Memos you'd like to delete.
5. Go to the Edit Menu and click on Delete or just hit the Del key on the keyboard. The following screen will appear.

6. Assuming the data has already been exported to a text file, it is not really necessary to *Archive deleted items at next HotSync*, so uncheck this box. If the data was not exported to a text file, the leave it checked.
7. Then perform another HotSync with the PDA having the same HotSync name as selected in step 2.
8. This will erase the data on the PDA. If the *Archive deleted items at next HotSync* was checked, then archive files(CardViso.MPA & RawData.MPA) will be created in the MemoPad directory for that Hotsync name. See below.


memopad
File Edit View Favorites Tools Help
Back Search Folders
Address C:\Program Files\Handspring\Scanne\memopad
Go
Name Size Type Modified
memopad.bak 1 KB BAK File 8/30/2005 8:18 PM
memopad.dat 1 KB Probe Document 8/30/2005 8:18 PM
Unfiled.MPA 4 KB Movie Clip 8/30/2005 8:16 PM
CardViso.MPA 2 KB Movie Clip 8/30/2005 8:18 PM
RawData.MPA 5 KB Movie Clip 8/30/2005 8:18 PM
1 object(s) selected
3.97 KB
My Computer

These archive files may be opened by the Palm Desktop software and merged with an existing MemoPad transaction list. See the Palm Desktop software user manual for details.

CardVisor III & IV VIP & Banned Database - Creation and Usage

Introduction

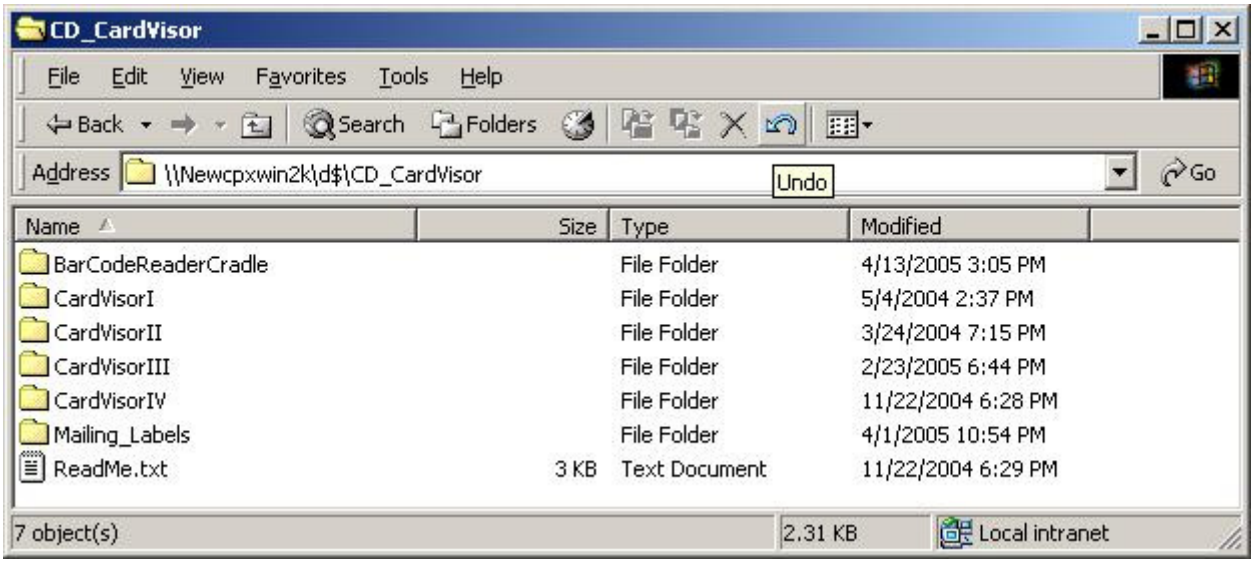
CardVisor III & IV software have the ability to check if a driver's license is on a list of approved and/or denied visitors. This allows the operator to monitor who is showing up at the door and greet those on the list in an appropriate fashion. The sections below will describe this feature in greater detail and demonstrate how to create, install, and maintain the VIP/Banned database.

Creating VIP/Banned lists – two methods

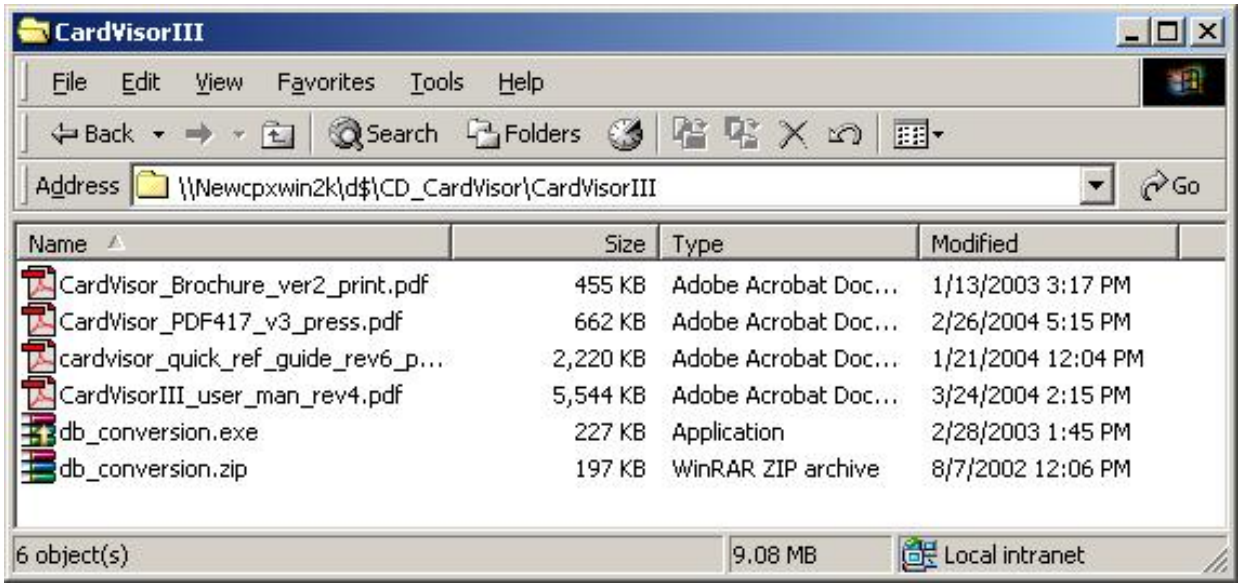
There are two methods to create the VIP/Banned list. The original method (described below) involves copying software from the CardVisor CD to a PC hard drive, creating a VIP/Banned list using a text editor such as Notepad and manually sorting the list or using Microsoft Excel to create/sort the list. Once the list is created and checked, a batch file is run which converts the saved text file into a Palm Database that then is installed on the ID scanner. The new method still relies on Notepad or Excel to create the sorted text input file but uses a windows interface to create and install the VIP/Banned palm database. This new software is called ListMaker and its located in the ListMaker Directory on the CardVisor CD. In the following section, read how to create/sort the VIPBanned list and how to install the database conversion utilities. Then install the software found in the ListMaker directory and uses it to create and install the VIPBanned Palm database. See the installation/usage document found in the ListMaker Directory.

Database Conversion Utility Installation – the original method

The files necessary to create the VIP/Banned database are in a zip file located in the *CardVisor III* directory on the White CardVisor CD. Shown Below is the main directory of the CD followed by the CardVisor III directory.

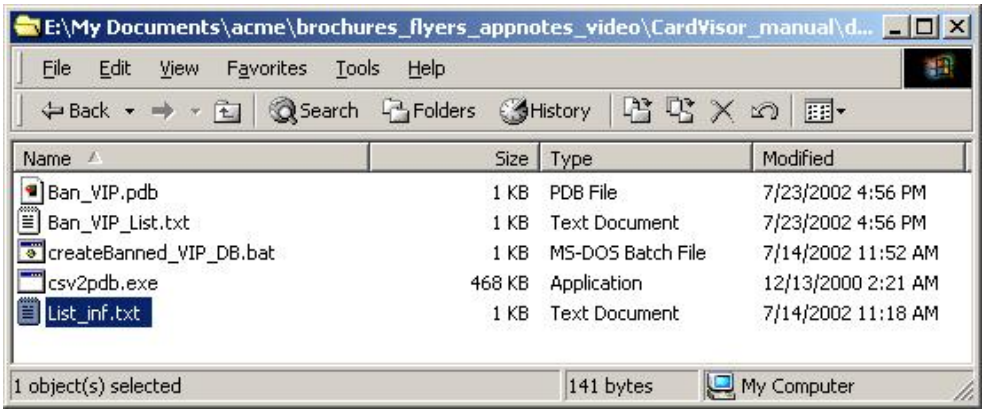

CD_CardVisor
File Edit View Favorites Tools Help
Back Search Folders
Address \\Newcpxwin2k\d$\CD_CardVisor
Undo
Go
Name Size Type Modified
BarCodeReaderCradle File Folder 4/13/2005 3:05 PM
CardVisorI File Folder 5/4/2004 2:37 PM
CardVisorII File Folder 3/24/2004 7:15 PM
CardVisorIII File Folder 2/23/2005 6:44 PM
CardVisorIV File Folder 11/22/2004 6:28 PM
Mailing_Labels File Folder 4/1/2005 10:54 PM
ReadMe.txt 3 KB Text Document 11/22/2004 6:29 PM
7 object(s)
2.31 KB
Local intranet

Root Directory of CardVisor CD


CardVisorIII
File Edit View Favorites Tools Help
Back Search Folders
Address \\Newcpxwin2k\d$\CD_CardVisor\CardVisorIII
Go
Name Size Type Modified
CardVisor_Brochure_ver2_print.pdf 455 KB Adobe Acrobat Doc... 1/13/2003 3:17 PM
CardVisor_PDF417_v3_press.pdf 662 KB Adobe Acrobat Doc... 2/26/2004 5:15 PM
cardvisor_quick_ref_guide_rev6_p... 2,220 KB Adobe Acrobat Doc... 1/21/2004 12:04 PM
CardVisorIII_user_man_rev4.pdf 5,544 KB Adobe Acrobat Doc... 3/24/2004 2:15 PM
db_conversion.exe 227 KB Application 2/28/2003 1:45 PM
db_conversion.zip 197 KB WinRAR ZIP archive 8/7/2002 12:06 PM
6 object(s)
9.08 MB
Local intranet

CardVisor III Directory

Copy either the *db_conversion.zip* or *db_comversion.exe* file to a directory on the PC's harddisk and unzip them. After unzipping the archives, a new directory is created with 5 files shown below. This new directory is the database conversion directory.


E:\My Documents\acme\brochures_flyers_appnotes_video\CardVisor_manual\d...
File Edit View Favorites Tools Help
Back Search Folders History
Name Size Type Modified
Ban_VIP.pdb 1 KB PDB File 7/23/2002 4:56 PM
Ban_VIP_List.txt 1 KB Text Document 7/23/2002 4:56 PM
createBanned_VIP_DB.bat 1 KB MS-DOS Batch File 7/14/2002 11:52 AM
csv2pdb.exe 468 KB Application 12/13/2000 2:21 AM
List_inf.txt 1 KB Text Document 7/14/2002 11:18 AM
1 object(s) selected
141 bytes
My Computer

Directory after unzipping db_conversion files

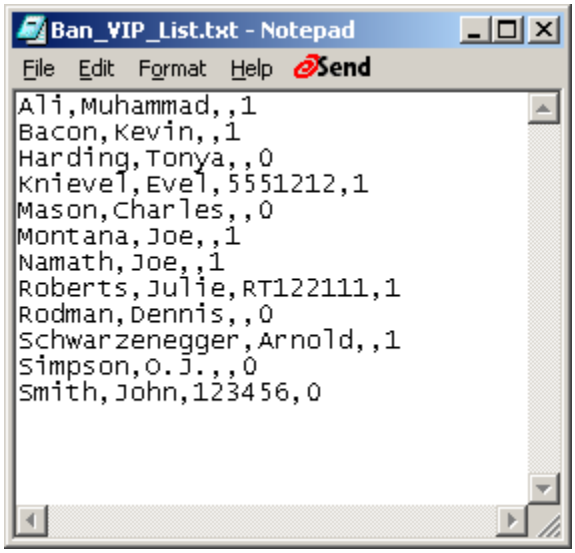
Ban_VIP.pdb	Palm OS database file which gets installed into handheld
BAN_VIP_List.txt	Contains the customer data – names/license #/ status
CreateBanned_VIP_DB.bat	Batch file that calls csv2pdb.exe using Ban_VIP_List.txt
Csv2pdb.exe	Creates Ban_VIP.pdb when called by batch file
List_inf.txt	File Descriptor – do not modify

The 'Ban_VIP_List.txt' text file contains the raw data that is converted into the Ban_VIP.pdb Palm OS database. Do not rename this file as the batch file looks for a file by this name when creating the Ban_VIP.pdb file. This is the file which will be updated with your customer data.

Description of Ban_VIP_List.txt format

Each entry in the VIP/Banned list has four fields; the first name, the last name, the driver license number (if known) and the member status.

Field 1 (Required)	Field 2 (Reqcommeded)	Field 3 (Recommended)	Field 4 (Required)
Last Name	*First Name*	*Drivers License Number*	*Status*
Text String	Text String	Alphanumeric Text String	One digit Numeric String – Zero (0) for Banned, One (1) for VIP, etc. (see chart below for other values)



Sample File provided on CD

Shown above is the sample file provided on the CardVisor CD. Notice some entries do not have a license number but that each line has 3 commas on it. The first name and driver license numbers are optional but recommended.

How the VIP/Banned feature works

After a card is swiped and the last name has been decoded, a last name search is performed in the VIP/Banned database.

If there is a match on the last name, then the software will determine if the driver license numbers match. If there is one or more last names that match and none that matches the license number, then the possible match screen will be displayed. Only names without a license number will be displayed on the

possible match list (those with license numbers are omitted).

If the person scanned is actually on the list without a license number, then now is the time to append a note to the swipe data indicating their status. Hit OK to clear the screen and use the append notes feature on the main screen to record the person's status. Once that data is transferred to a PC, their license number may be added to the existing VIP/Banned list. Alternatively, you can open the MemoPad application, scroll the appropriate memo and manually append a note to this person's swipe data indicating their VIP or Banned status. See the section titled *Tip - Adding Notes to Swipe Data – Alternate to Append Note button*

If there is an exact match on the last name and driver license number, the confirmed match list will be displayed. Again the far right column will contain the status of the individual (Banned/VIP/bar staff/etc.)

Status Codes

Code	Printed Message in Bold	Code	Printed Message inBold
0	Banned – *Not allowed*	5	S.O.S. - *Call a supervisor*
1	VIP – *Very Important Person*	6	Member - *Member in good standing*
2	CheckID - *Check this ID in detail*	7	Owes $ - *Owes Money (new code as of June 2005 release)*
3	911 - *Call the Police*	8	RFU -Reserved for Future Use
4	BarStaf - *Bar Staff*	9	RFU -Reserved for Future Use
Any other value results in an Unknown status message			

Notes & Limitations

- The last name comparison is NOT case sensitive. Capitalization does not matter in the database.
- The software will display up to 6 people with the same last name on the possible match list. The latest version of software allows scrolling through the VIP/Banned list by using the up/down arrows or scroll buttons once the possible match list is displayed.
- Last names must NOT be hyphenated.

How to Modify the Ban_VIP_List.txt file

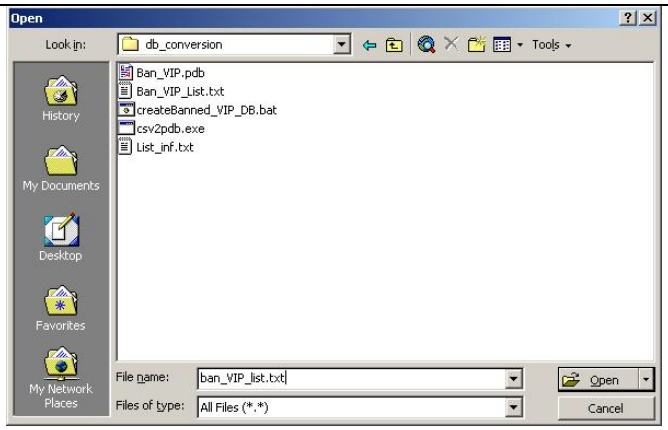
There are two approaches to modifying this text file. The first is to use a simple text editor like NotePad or WordPad to open the file, manually insert a new entry at the correct alphabetical location or update an existing entry and save the changes. Make sure to follow the constraints/requirements listed in the review section below. It is important to follow these formatting constraints. This approach works well if only minor changes are required. If the number of new names to be added is large or significant sorting is required, then it may be easier to use Microsoft Excel.

In the following images, the steps required to open, sort and save the Ban_VIP_List.txt list using Microsoft Excel are provided. Note: These instructions were written using Microsoft Excel 2000.

Start by launching Excel and opening the Ban_VIP_List.txt file.

Open the ban_VIP_list with Microsoft Excel

Since this is a text file, Excel should launch the import wizard that will guide the import process. Note: Microsoft Access has a similar import wizard and these directions will work for Access with minor modifications.

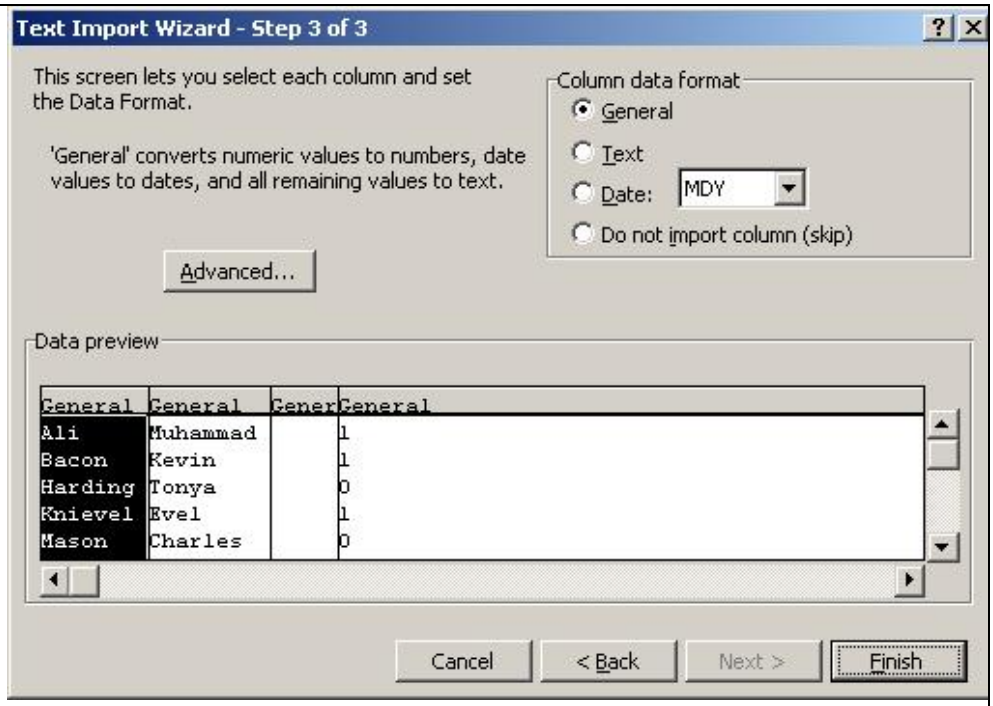


If the Text Import Wizard does not launch, then open the ban_VIP_List.txt after setting the 'Files of type' dialog box to 'txt'.

Select Delimited option in step one

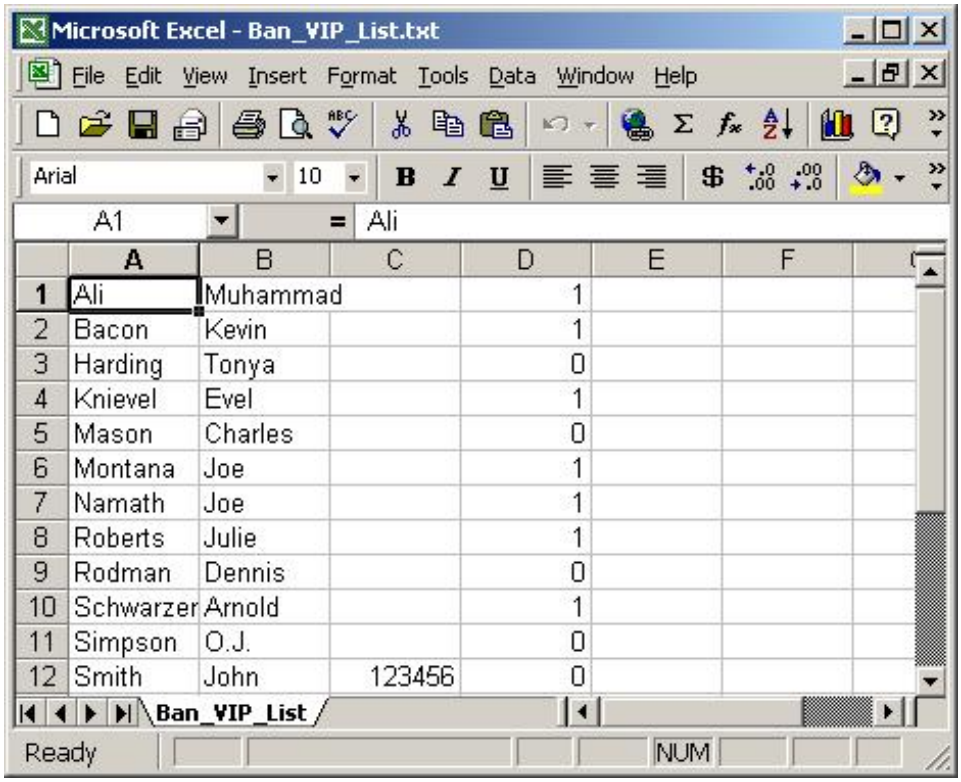
Text Import Wizard - Step 1 of 3
The Text Wizard has determined that your data is Delimited.
If this is correct, choose Next, or choose the data type that best describes your data.
Original data type
Choose the file type that best describes your data:
Delimited - Characters such as commas or tabs separate each field.
Fixed width - Fields are aligned in columns with spaces between each field.
Start import at row:
1
File origin:
Windows (ANSI)
Preview of file C:\db_conversion\Ban_VIP_List.txt.
1 Ali,Muhammad,,1
2 Bacon,Kevin,,1
3 Harding,Tonya,,0
4 Knievel,Evel,,1
5 Mason,Charles,,0
Cancel
< Back
Next >
Finish

Check Comma as the Delimiters and 'none' for text qualifier in the second step Notice vertical lines drawn where comma's were located.	

Accept General data format for all columns in step 3	

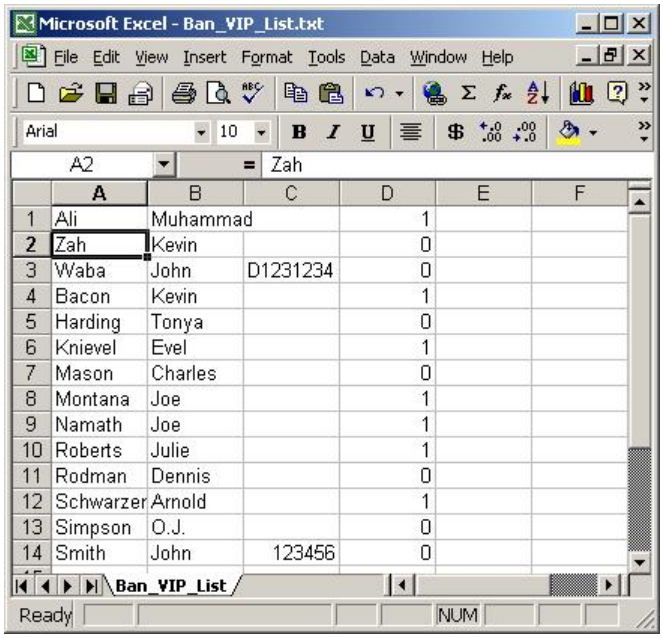
Shown is the Final result of Excel import wizard.

Note: each field in its own column and no additional characters in each field.

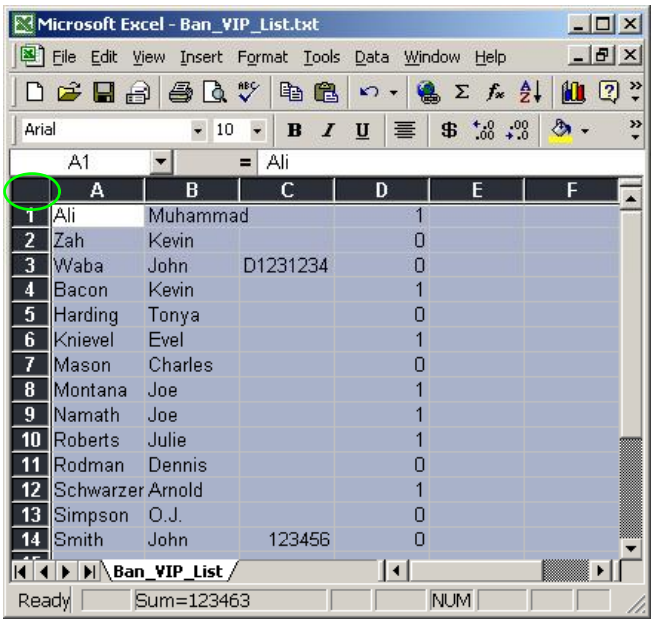
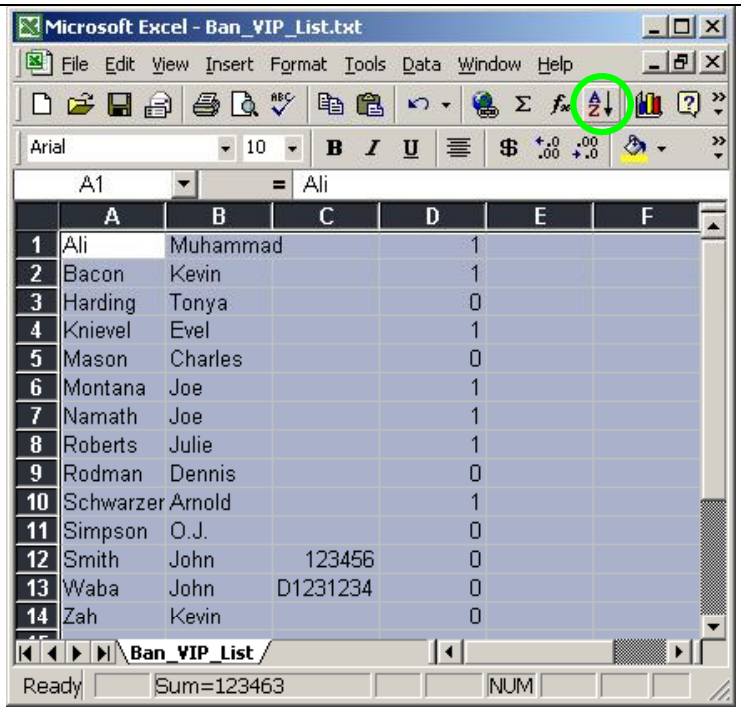


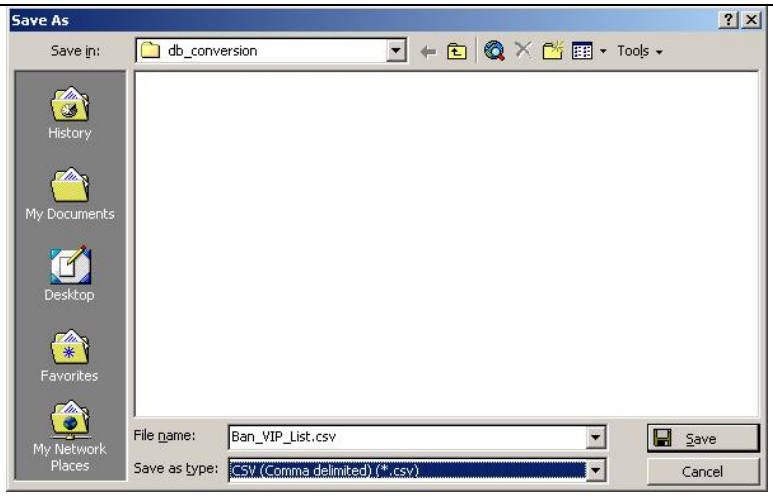
	A	B	C	D
1	Ali	Muhammad		1
2	Bacon	Kevin		1
3	Harding	Tonya		0
4	Knievel	Evel		1
5	Mason	Charles		0
6	Montana	Joe		1
7	Namath	Joe		1
8	Roberts	Julie		1
9	Rodman	Dennis		0
10	Schwarzer	Arnold		1
11	Simpson	O.J.		0
12	Smith	John	123456	0

After Adding two new names (Zah and Waba) after Ali, the data is ready for sorting

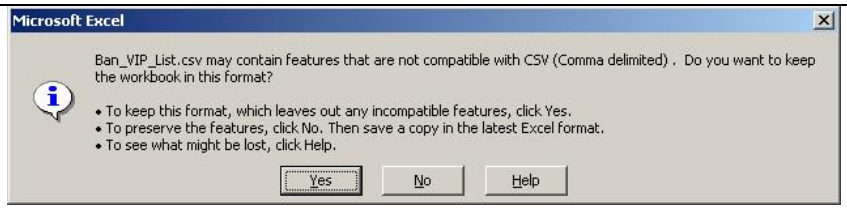


	A	B	C	D
1	Ali	Muhammad		1
2	Zah	Kevin		0
3	Waba	John	D1231234	0
4	Bacon	Kevin		1
5	Harding	Tonya		0
6	Knievel	Evel		1
7	Mason	Charles		0
8	Montana	Joe		1
9	Namath	Joe		1
10	Roberts	Julie		1
11	Rodman	Dennis		0
12	Schwarzer	Arnold		1
13	Simpson	O.J.		0
14	Smith	John	123456	0

Click square, which is to upper left of cell A1. This will highlight entire worksheet Notice all cells are highlighted in blue/gray after clicking this square.	
Hit the Sort Ascending Button to sort by last name. Shown is the spreadsheet after sort. Notice Waba and Zah have been moved to bottom	
Select the File->Save As menu item and then select the 'save as type' to be CSV Note: Make sure it says *.csv in the *save as type* box	



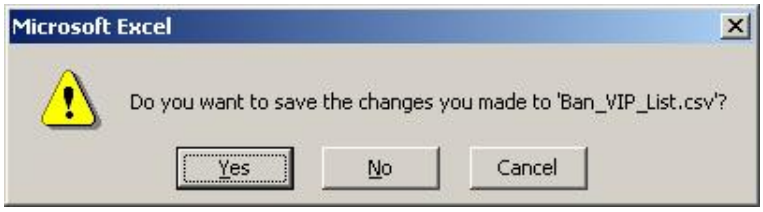
Hit Yes when this message appears


Microsoft Excel
Ban_VIP_List.csv may contain features that are not compatible with CSV (Comma delimited) . Do you want to keep the workbook in this format?
• To keep this format, which leaves out any incompatible features, click Yes.
• To preserve the features, click No. Then save a copy in the latest Excel format.
• To see what might be lost, click Help.
Yes
No
Help

Then exit Excel.

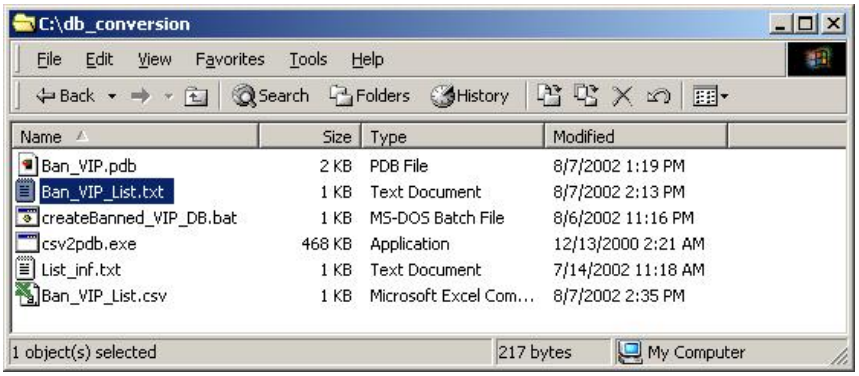
Before existing, Excel will generate this message:

Just hit no when this message is received. The file was already saved.



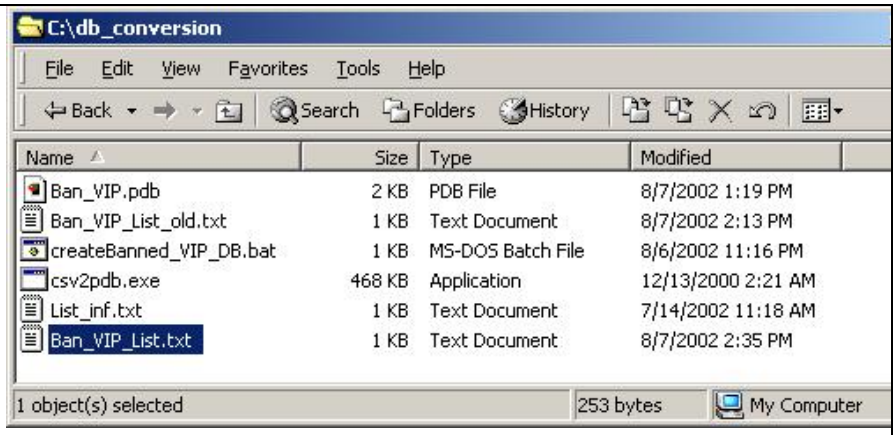
The directory should now look like this:

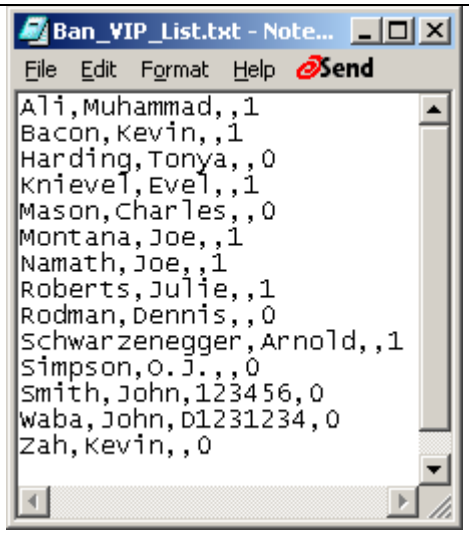
Notice the original Ban_VIP_List.txt file and the new Ban_VIP_List.csv file.


C:\db_conversion
File Edit View Favorites Tools Help
Back Search Folders History
Name Size Type Modified
Ban_VIP.pdb 2 KB PDB File 8/7/2002 1:19 PM
Ban_VIP_List.txt 1 KB Text Document 8/7/2002 2:13 PM
createBanned_VIP_DB.bat 1 KB MS-DOS Batch File 8/6/2002 11:16 PM
csv2pdb.exe 468 KB Application 12/13/2000 2:21 AM
List_inf.txt 1 KB Text Document 7/14/2002 11:18 AM
Ban_VIP_List.csv 1 KB Microsoft Excel Com... 8/7/2002 2:35 PM
1 object(s) selected
217 bytes
My Computer

Directory after saving the new file in CSV format.

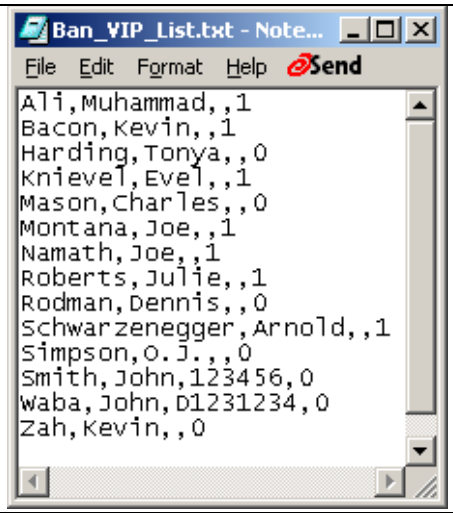
The next step is to rename the Ban_VIP_List.txt file to something like Ban_VIP_List_old.txt and

then rename Ban_VIP_List.csv to Ban_VIP_List.txt. After making these changes, the directory should look like this. The directory should now look like this:	 Directory after making name changes.

Open the Ban_VIP_List.txt and the contents should look like this:	 Contents of Ban_VIP_List.txt after changes

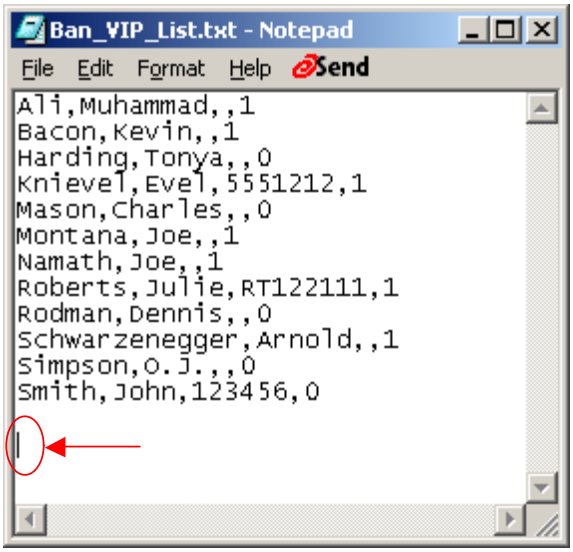
Reviewing the Ban_VIP_List.txt file

Before running the conversion software, perform a final inspection of the data in the Ban_VIP_List.txt file. Open the file with NotePad and review the points listed below.

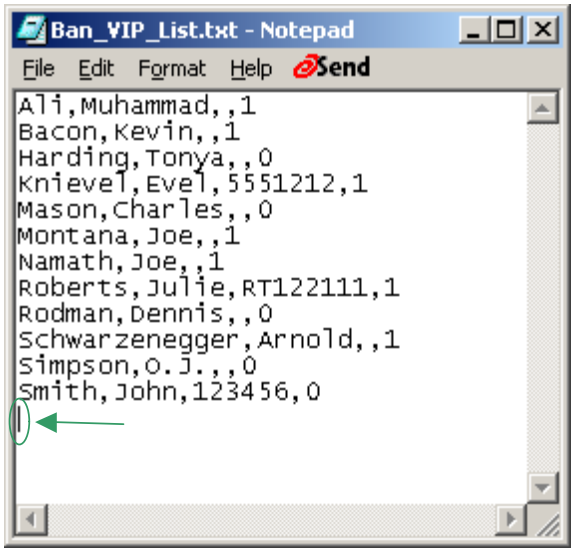
• Check to ensure the records are sorted, by last name, in ascending order from top to bottom. • Check to make sure there are commas between the columns and carriage returns at the end of each line (i.e. only four columns per line) • Make sure each line has at least a last name and either a 1 or a 0 in the status column. • Make sure there are no column	

header titles • Make sure there is only one carriage return at the end of the file.	Ban_VIP_List.txt opened in Notepad

Below is an example of an extra carriage return and correct number of carriage returns would look like.



Extra Carriage Return



Correct Number of Carriage Returns

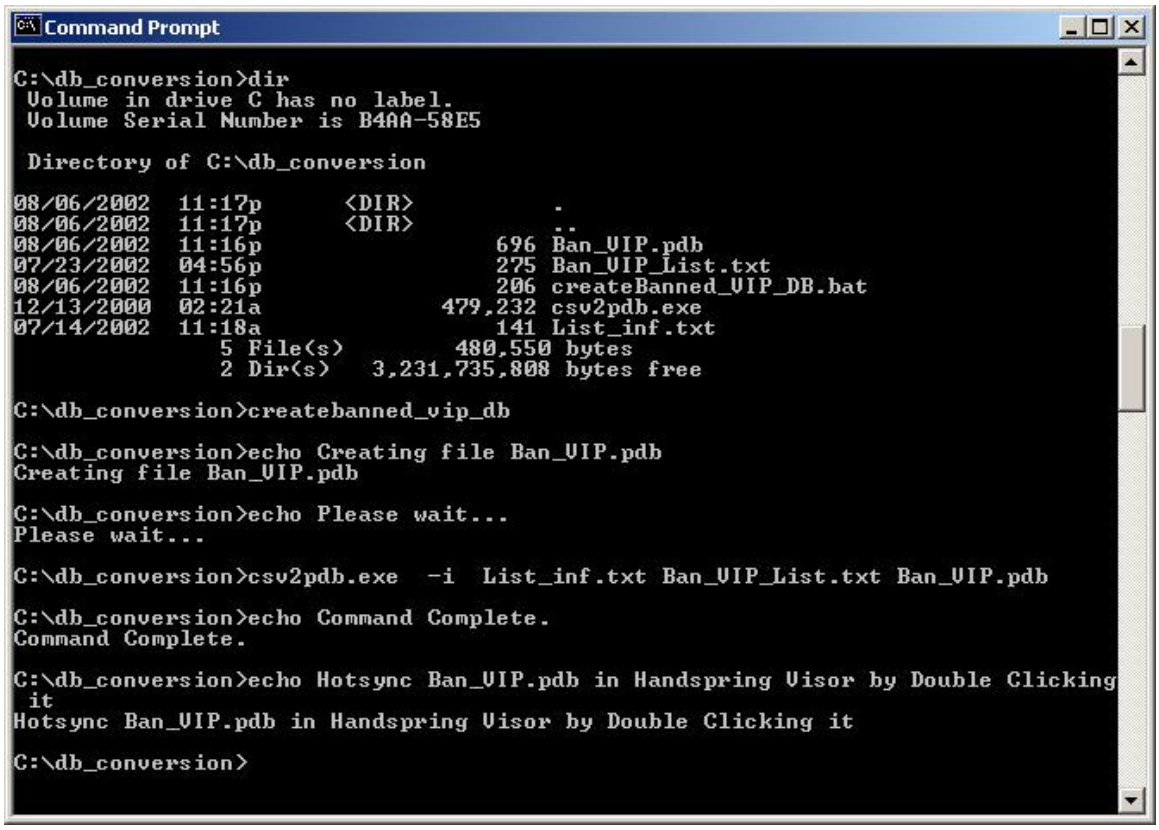
Example of an extra carriage return after the last record. There should be only one carriage return as shown on the right. Delete extra returns or conversion routine will not process the Ban_VIP_List.txt file

Convert the Ban_VIP_LIST.txt file into a Ban_VIP.pdb Palm OS database file

The next step is to run the conversion utility that creates the Palm Data Base (PDB) file. This step uses a batch file to transform the Ban_VIP_List.txt into a Palm OS database file which has a *.PDB extension. The batch file name is 'createBanned_VIP_DB.bat'. This batch file calls csv2pdb.exe and uses a file called List_inf.txt to process the Ban_VIP_list.txt file into the output file. Do not change or edit the list_inf.txt or batch file.

To perform this step;

1. First delete the Ban_VIP.pdb file in the directory. This will ensure the old version is not used in the event the new one is not created.
2. Then double click on the 'createBanned_VIP_DB.bat' file and a black DOS window (see below) should flash on the screen while the program executes. On fast PCs and small files, it happens very quickly. Depending on the size of the database, this process can take anywhere from a few seconds to a couple minutes.



DOS window opened when the batch file is executing

If there is a problem with the Ban_VIP_List.txt, an error message will be displayed on the screen. The error message may not be displayed long on a fast machine. If the Ban_VIP.pdb database is not created, then open a DOS window, change to the database conversion directory by using the ChangeDirectory command [CD], and run the createbanned_vip_db.bat file by typing 'createbanned_vip_db.bat' at the command prompt. This will keep the window open long enough to read the error message. If the conversion utility states there is an error on the number of fields, it is likely that there are extra carriage returns at the end of the Ban_VIP_List.txt file or missing commas on a line. Make corrections to the Ban_VIP_List.txt and try again.

Once completed, its time to Hotsync it into the Handspring Visor. This will transfer the file to the handheld computer.

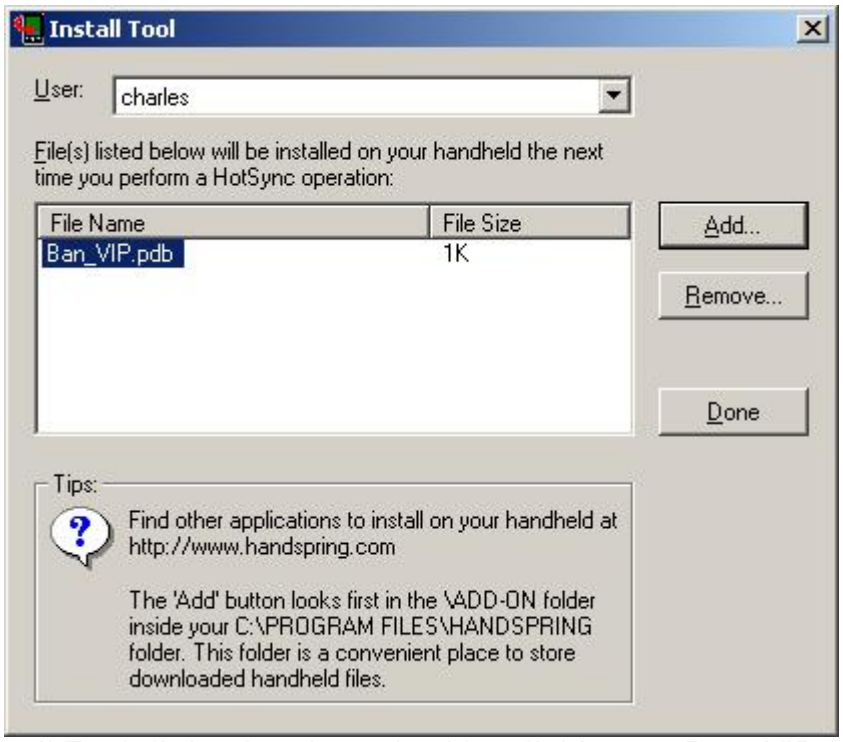
HotSync the Ban_VIP.pdb Database

This section assumes the Palm Desktop software has been installed on the PC. See the section titled *Step 1 – Installing PC Software* for installation details.

To install the Ban_VIP.pdb file on the Handspring Visor – Just click on the Ban_VIP.pdb file and the following dialog box will be launched. If it doesn't, then launch the Palm Desktop application and use the install feature by either clicking on the install icon

or select View - > Install from the main menu.

Either should launch the Install Tool dialog box shown below.


Install Tool
User:
charles
File(s) listed below will be installed on your handheld the next time you perform a HotSync operation:
File Name
File Size
Ban_VIP.pdb
1K
Add...
Remove...
Done
Tips:
Find other applications to install on your handheld at http://www.handspring.com
The 'Add' button looks first in the \ADD-ON folder inside your C:\PROGRAM FILES\HANDSPRING folder. This folder is a convenient place to store downloaded handheld files.

Install Tool dialog box launched by clicking on Ban_VIP.pdb

Once this dialog box displays, make sure the User name corresponds to the appropriate handheld. Selecting the wrong User name sends the file to a different handheld during the Hotsync process. After verifying the Hotsync User name, hit Done. The following dialog box will display after done is clicked.

That's it. Next time the Handspring Visor is put in the cradle and the Hotsync button is pushed, the Ban_VIP.pdb file will be transferred into the Handspring Visor (assuming it has the same User name as selected above).

Congratulation on loading your first Ban_VIP database!
Now it is vital to test the file on the handheld to prevent fatal error messages on the handheld. Do not skip this step!

Testing the Ban_VIP database in the HandHeld

After loading a new database, its important to test it to make sure that it was properly installed and created. Errors in the database will cause fatal error warnings so its important to resolve or remove the database from the handheld's memory.

Select the 'Test VIP/Banned Database' Menu Item	
The first line states the number of names in the database. In this example there are 22 names.	
While testing, a '.' Will print out on the screen for each record being tested. If all pass, then a message similar to this will be displayed.	
If there is a problem, it is likely that the last names are not in the proper order. The software will stop testing the database as soon as it finds one name out of order. If this error occurs, review the Ban_VIP_List.txt file, correct any errors and recreate & install the database.	

If the database was not loaded, then the message shown to the right will be displayed.	

Errors in the Ban_VIP database will cause fatal errors messages or unresponsiveness. Either correct and replace the Ban_VIP database or DELETE IT from the handheld's memory. Below is directions on deleting the database.

From the main Applications screen, select the menu icon which displays a pull down menu.	Select Delete on the pull down menu which displays a list of files for possible deletion.	Select the Ban_VIP database and select Delete to delete it from memory.

VIP/Banned List Database Trouble Shooting

Problem	Possible Problem	Possible Solution
Can not create VIP_Banned.pdb from Ban_VIP_List.txt file	Missing comma(s) between fields, extra commas in line or missing carriage return at end of each line.	Check to make sure there are commas between the columns and carriage returns at the end of each line (i.e. only four columns per line)
	More than one or no carriage return after the last line in Ban_VIP_List.txt file	Make sure there is only one carriage return at the end of the file.
	Data is incomplete	Make sure each line has at least a last name and either a 1 or a 0 in the status column.
While creating the VIP_Banned.pdb file, receiving the 'error on the number of fields'	Extra carriage returns at the end of the Ban_VIP_List.txt file.	Just delete extra carriage returns at the end of the Ban_VIP_List.txt file and try again.
Person not being found in database	Database not in proper order	Test database using Test VIP/Banned Database' Menu Item and if out of order, recreate and reinstall database.
	The driver's license number for the person does not match the one in the database.	Compare the driver's license number captured for the license (open Memo in MemoPad). If different with number stored in database, either remove number from database (this will cause them to be displayed on the possible match screen) or update their license number with the same number captured by CardVisor (this will cause them to be displayed on the confirmed match screen).
	Database not loaded.	Test database using Test VIP/Banned Database' Menu Item and if out of order, recreate and reinstall database.
	More than six people with same last name and no license numbers	Enter the driver's license number captured for this person (captured Memo in MemoPad) into the database. This will cause them to be displayed on the Confirmed match screen.
	The Status field is not a '1' or a '0'	Review the status field for this person and ensure there is a '1' or '0' character in the field. Any other character will cause the record to be ignored.
Person has wrong status	Status field not set correctly	If the status field is 1, the person will be categorized as VIP, if it is any other value (e.g. 55 or 0), they will be categorized as BANNED. Correct status field and reload database

Encoded Stripe (Magnetic & Bar Code) – Formats & Reliability

Formats

The CardVisor ID scanner reads encoded information off the encoded (magnetic or 2D bar code) stripe of drivers license or ID card. While most states have the same basic information on the encoded stripe, the locations and format differ. From time to time, states will change how they encode the information on the stripe. Additionally, since most do not read what they've encoded, they sometimes make mistakes that become part of the issued card population. This may cause difficulty in parsing the data. When the software is unsure, it creates a memo in the MemoPad application that starts with the phrase "Trouble Parsing this data ->..." If you see a Memo like this, then please email it to support@tokenworks.com or email the entire MemoPad file (MemoPad.dat) and you will be one of the first to receive a software update that address this new license format.

Reliability

Driver licenses are exposed to varying conditions in a typical 4 to 6 year life cycle. Unlike credit cards, Driver licenses are not frequently swiped nor are

they typically replaced if the encoded stripe is damaged. Therefore, read performance will vary with older licenses in typically poorer condition.

For licenses with Magnetic stripes, it is possible to read just Track 2 of a license since it is encoded at a lower bit density than tracks 1 and 3, and less sensitive to damage. Track 2 has the driver's license number, date of birth and expiration date. If the name does not appear on the screen, it is possible that Track 1 has become unreadable while track 2 is still readable. Note: The software must be able to read track 2 information to display the age and card status.

For licenses with 2D bar codes, make sure the bar code is not damage and that all foreign material is removed before reading. The level of error correction incorporated into the bar code varies between states so some states will scan with quite a bit of damage while others will fail with minor damage.

Document Information

EVOLUTION OF THE DOCUMENT			
Version	Date	Author	Evolution
UM-032107-CC-R0	03/21/2007	CC	Initial Release – Updated Palm Desktop installation section of CardVisor Software manual
UM-032107-CC-R1	06/28/2007	CC	Added ListMaker and MemoPad2CSV sections

Limited Warranty - CardTool® reader and/or CardVisor® software

TokenWorks™ Inc. (hereafter "TokenWorks") warrants the TokenWorks CardTool® reader, the CardVisor® software, and this Manual, hereafter jointly or individually the "product" IN ITS ENTIRETY, to be in good working order for a period of 90 days from the date of purchase. Should this product fail to be in good working order at any time during this warranty period, TokenWorks will, at its option, repair or replace this product at no additional charge except as set forth below. Repair parts and replacement products will be furnished on an exchange basis and will be either reconditioned or new. All replaced parts and products become the property of TokenWorks. This limited warranty does not include service to repair damage to the product resulting from accident, disaster, misuse, abuse, or modification of the product performed without the prior written approval of TokenWorks.

Limited Warranty service may be obtained by sending the product during the warranty period to TokenWorks. Before sending material, please obtain a Return Material Authorization (RMA) number by requesting one from TokenWorks. To obtain additional return and contact information, visit www.tokenworks.com. If this product is to be returned you agree: (a) to insure the product or assume the risk of loss or damage in transit; (b) to prepay shipping charges to the warranty service location, and (c) to use the original shipping container or equivalent.

ALL EXPRESS AND IMPLIED WARRANTIES FOR THIS PRODUCT, INCLUDING THE WARRANTIES OF MERCHANTABILITY AND FITNESS FOR PARTICULAR USE, ARE LIMITED IN DURATION TO A PERIOD OF 90 DAYS FROM THE DATE OF PURCHASE, AND NO WARRANTIES, WHETHER EXPRESS OR IMPLIED, SHALL CONTINUE BEYOND SUCH PERIOD. EACH PURCHASER UNDERSTANDS THAT THE TOKENWORKS PRODUCT IS OFFERED AS IS. TOKENWORKS AND ITS SUPPLIERS ASSUME NO RESPONSIBILITY FOR ANY DAMAGE OR LOSS CAUSED BY DELETION OF DATA AS A RESULT OF MALFUNCTION, DEAD BATTERY, OR REPAIRS. BE SURE TO MAKE BACKUP COPIES OF ALL IMPORTANT DATA ON OTHER MEDIA TO PROTECT AGAINST DATA LOSS.
IF THIS PRODUCT IS NOT IN GOOD WORKING ORDER AS WARRANTED ABOVE, YOUR SOLE REMEDY SHALL BE REPAIR OR REPLACEMENT AS PROVIDED ABOVE. IN NO EVENT WILL TOKENWORKS BE LIABLE TO YOU FOR ANY DAMAGES, INCLUDING ANY LOST PROFITS, LOST SAVINGS OR OTHER INCIDENTAL OR CONSEQUENTIAL DAMAGES ARISING OUT OF THE USE OF OR INABILITY TO USE SUCH PRODUCT OR FOR ANY CLAIM BY ANY OTHER PARTY, IRRESPECTIVE OF ANY NOTICE TO TOKENWORKS OF THE POSSIBILITY OF SUCH DAMAGES OR CLAIM. THIS WARRANTY GIVES YOU SPECIFIC LEGAL RIGHTS. YOU MAY ALSO HAVE OTHER RIGHTS, WHICH VARY FROM STATE TO STATE.

Age Verification Calculation Limitations

The CardVisor application is warranted to read the date of birth information encoded on the machine-readable (magnetic or 2D bar code) stripe and display the current age based on current date/time information contained in the handheld computers real time clock (RTC). It will also read other information on the stripe and present it to the operator. It should be understood that the displayed age may differ from the actual age of the person presenting the card for any one of a number of reasons. Among the most likely are:

- the card does not belong to the person presenting it,
- the encoded machine-readable stripe has been altered,
- the date of birth presented to the issuing authority was misrepresented,
- the issuing authority mis-encoded the date of birth on the card,
- the handheld computer real time clock is not set to the current date/time.

The above list of reasons is not exhaustive.

State and Local Privacy Laws, Ordinances or Rules

Some states and local government units regulate who, how and what information from a driver's license can be electronically viewed or recorded. Check with the authorities in your jurisdiction before using the CardVisor product. Purchaser is wholly responsible for insuring full compliance with the laws of the jurisdiction wherein the product is to be used. TokenWorks fully disclaims any liability for any loss, damages or untoward circumstances that may arise from the inappropriate use of the product or of the data retrieved through its use.

End of Document.